NoteSwift™ for

Allscripts TouchWorks® EHR

Tips and Tricks to get the Most out of Your EHR

July, 2014

NoteSwift Inc. One Boston Place Suite 2600 Boston, MA 02108 www.noteswift.com

Copyright

Copyright

© 2010 – 2014 NoteSwift, Inc. All Rights Reserved.

NoteSwift™, the NoteSwift logo, SwiftNav™ and auto-jump™ are trademarks or registered trademarks of NoteSwift Inc. in the United States of America and/or other countries. All other company names or product names may be the trademarks of their respective owners. Designations used by third-party manufacturers and sellers to distinguish their products may be claimed as trademarks by those third-parties.

Dragon Medical Practice Edition and PowerMic™ are registered trademarks or trademarks of Nuance Communications.

Allscripts and the Allscripts logo are either registered trademarks or trademarks of Allscripts, in the United States and/or other countries.

The MIT License
Copyright (c) 2007 James Newton-King

Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the "Software"), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, sublicense, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, subject to the following conditions:

The above copyright notice and this permission notice shall be included in all copies or substantial portions of the Software.

THE SOFTWARE IS PROVIDED "AS IS", WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT. IN NO EVENT SHALL THE AUTHORS OR COPYRIGHT HOLDERS BE LIABLE FOR ANY CLAIM, DAMAGES OR OTHER LIABILITY, WHETHER IN AN ACTION OF CONTRACT, TORT

OR OTHERWISE, ARISING FROM, OUT OF OR IN CONNECTION WITH THE SOFTWARE OR THE USE OR OTHER DEALINGS IN THE SOFTWARE.

Cryptolicensing for .Net
Copyright © 2007-2014 LogicNP Software.

Microsoft Public License (Ms-PL)

This license governs use of the accompanying software. If you use the software, you accept this license. If you do not accept the license, do not use the software.

1. Definitions

The terms "reproduce," "reproduction," "derivative works," and "distribution" have the same meaning here as under U.S. copyright law.

A "contribution" is the original software, or any additions or changes to the software.

A "contributor" is any person that distributes its contribution under this license.

"Licensed patents" are a contributor's patent claims that read directly on its contribution.

2. Grant of Rights

(A) Copyright Grant- Subject to the terms of this license, including the license conditions and limitations in section 3, each contributor grants you a non-exclusive, worldwide, royalty-free copyright license to reproduce its contribution, prepare derivative works of its contribution, and distribute its contribution or any derivative works that you create.

(B) Patent Grant- Subject to the terms of this license, including the license conditions and limitations in section 3, each contributor grants you a non-exclusive, worldwide, royalty-free license under its licensed patents to make, have made, use, sell, offer for sale, import, and/or otherwise dispose of its contribution in the software or derivative works of the contribution in the software.

3. Conditions and Limitations

(A) No Trademark License- This license does not grant you rights to use any contributors' name, logo, or trademarks.

(B) If you bring a patent claim against any contributor over patents that you claim are infringed by the software, your patent license from such contributor to the software ends automatically.

(C) If you distribute any portion of the software, you must retain all copyright, patent, trademark, and attribution notices that are present in the software.

(D) If you distribute any portion of the software in source code form, you may do so only under this license by including a complete copy of this license with your distribution. If you distribute any portion of the software in compiled or object code form, you may only do so under a license that complies with this license.

(E) The software is licensed "as-is." You bear the risk of using it. The contributors give no express warranties, guarantees or conditions. You may have additional consumer rights under your local laws which this license cannot change. To the extent permitted under your local laws, the contributors exclude the implied warranties of merchantability, fitness for a particular purpose and non-infringement.

VcCom API
Copyright © 2014 Alan MacAree, All Rights Reserved.

More time with the patient.
Less time on the chart.

Contents

Copyright iii
First Things First 2
Assumptions: 2
About This Document: Typographic Weirdness and Helpful Info 3
Download and Installation 8
Installation 9
Activating Your Product 16
Create a User Profile 18
The TouchWorks® Note Window 22
NoteSwift Forms 23
History of Present Illness 25
Other Commands in the HPI Window 27
ROS Templates and ROS Aliases 29
Review of Systems 32
Social History 34
Family History 36
Medication History 37
Allergies 40
Active Problems 42
Orders 44
Using Aliases with Orders 47
Prescribe 49
Importing / Exporting Aliases 52
Appendix A: Command Cheat Sheet 55

Introduction

First Things First

- Do you have Dragon Medical Practice Edition installed?
- Do you have Allscripts® TouchWorks™ EHR?
- Do you have NoteSwift™ installed?

If you can answer yes to all three, then proceed to training! If you need to install any of the programs listed above, do so before proceeding. The first section of this manual, "Download and Installation" covers the installation process for NoteSwift.

Note: During the period of time in which this manual was created, Allscripts Enterprise underwent a name change to Allscripts TouchWorks® EHR. The two names are referred to interchangeably in this edition of the manual but refer to the same EHR.

Assumptions:

This document assumes you are comfortable using speech recognition and that you are able to work with your EHR capably with or without speech recognition. If you are not comfortable with either, seek training before using NoteSwift.

About This Document: Typographic Weirdness and Helpful Info

There are certain typographic conventions in this document, which, once you learn them will help with you discern what is typed, clicked, or **said** in each example and exercise.

- NoteSwift commands, words you say to NoteSwift when you want something to happen, are in bold and initial capitals such as **History of Present Illness.** Additional command alternatives will be listed in parentheses **().**

- Where you need to pause your voice for a moment in between commands, we put a comma in the instruction. For example, **Exam, neuro, numbness on the right foot**. You would pause briefly where the commas appear.

- If the NoteSwift window has a Next button, it allows you to continue entering multiple items (such as in the Allergies, Medications, Tobacco History sections of Allscripts Pro). Say or click **Next** to add each item into your note. When finished, say or click **Done** or press the Next hotkey (see below) to enter all information into the form**.**

- NoteSwift also has a number of *power commands*, which operate slightly differently than the standard commands. They allow more complex navigation. For example, for an ROS template you can give the **All Normal** power command that will instantly bring down all the normal defaults for a template into the accumulator.

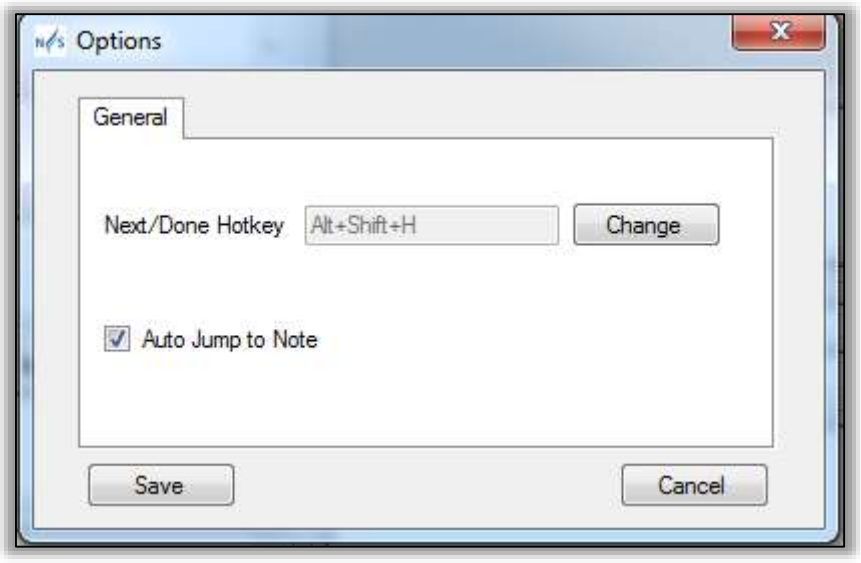
- If you are using a PowerMic hand held microphone, you have the ability to define hotkeys. The PowerMic II uses the defaults below. Find this dialog by clicking on Tools on the Dragon bar, then Options, then click on the PowerMic II tab. You can find more information on how to set your hotkeys in your PowerMic II and DMPE 2 documentation.

NOTE: In this manual, it is assumed you will dictate **Next** and **Done**, or that you will use a predefined hotkey on a microphone or your keyboard to accomplish the Next and

Done functions. If the directions specify that you “press the Next hotkey”, this means whatever hotkey you have defined.

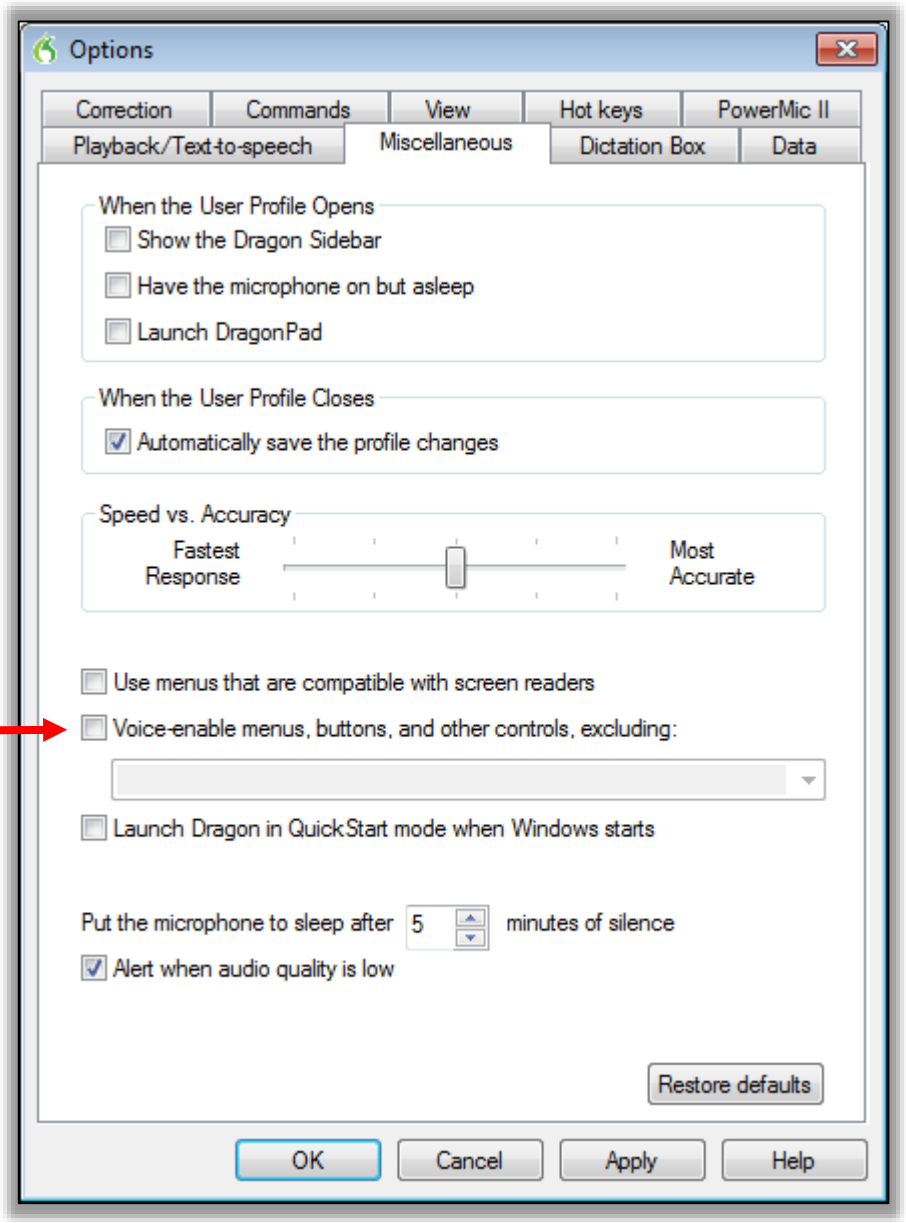
The Good Doctor icon. Whenever you see this icon, it means we have some helpful tips or advice for you from the Good Doctor himself, NoteSwift founder Dr. Chris Russell.

Here is your first tip from the Good Doctor! The Next hotkey can be assigned through the NoteSwift Options menu (image below) or through the PowerMic options Image previous page) found in Dragon Medical Practice Edition (herein after referred to as DMPE). ***Important:*** *If you choose a new hotkey ensure it isn’t assigned to a DMPE function.*



Before using NoteSwift, from the Dragon Toolbar, select Tools->Options->Miscellaneous, and uncheck the “Voice-enable menus, buttons, and other controls” button:

Make sure this is unchecked.

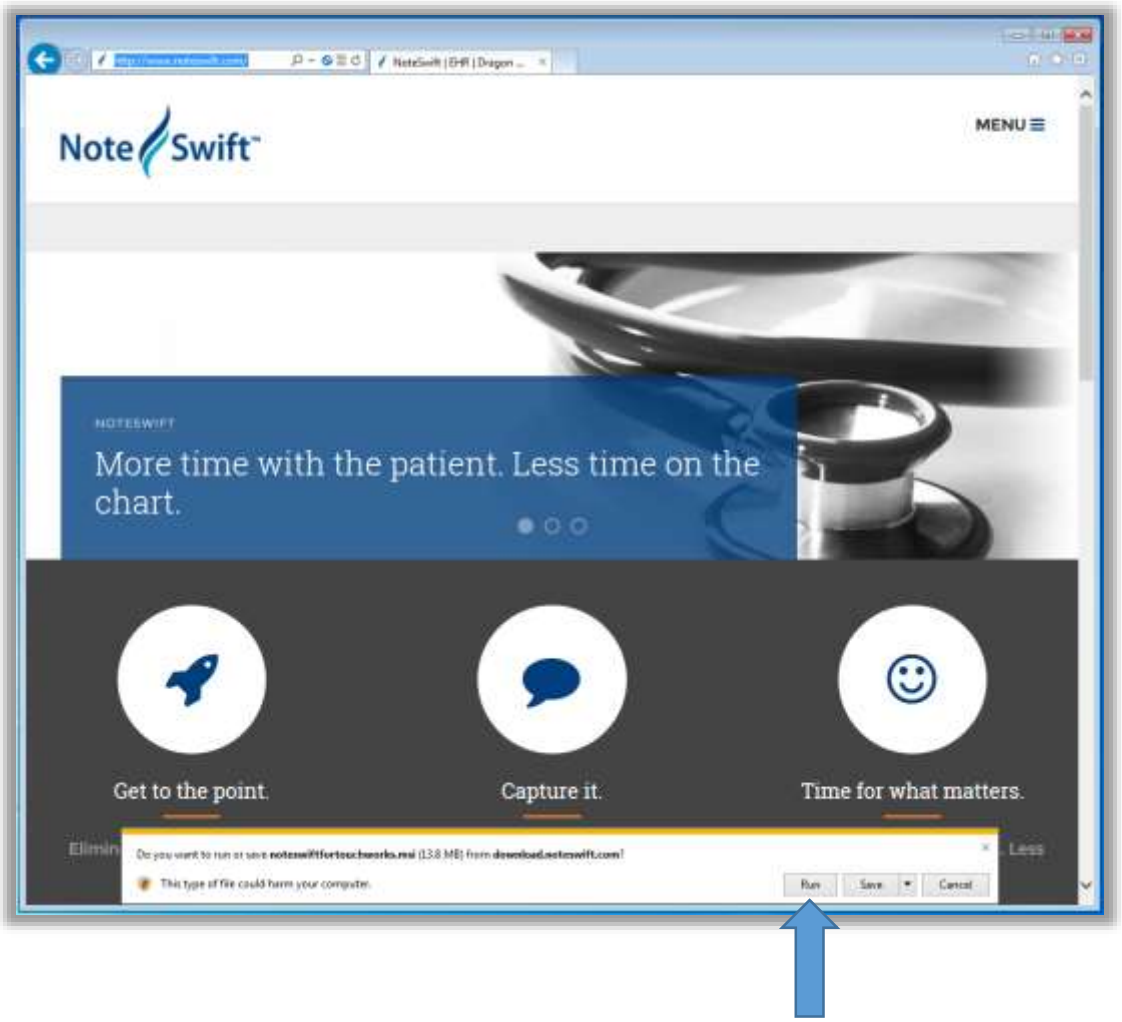


Download and Installation

To download NoteSwift on your computer, enter the following URL into your internet browser: http://download.noteswift.com/noteswift/allscriptstouchworks/client/noteswiftfortouchworks.msi.

A dialog appears asking you whether you'd like to run or save the file.

Select Run.



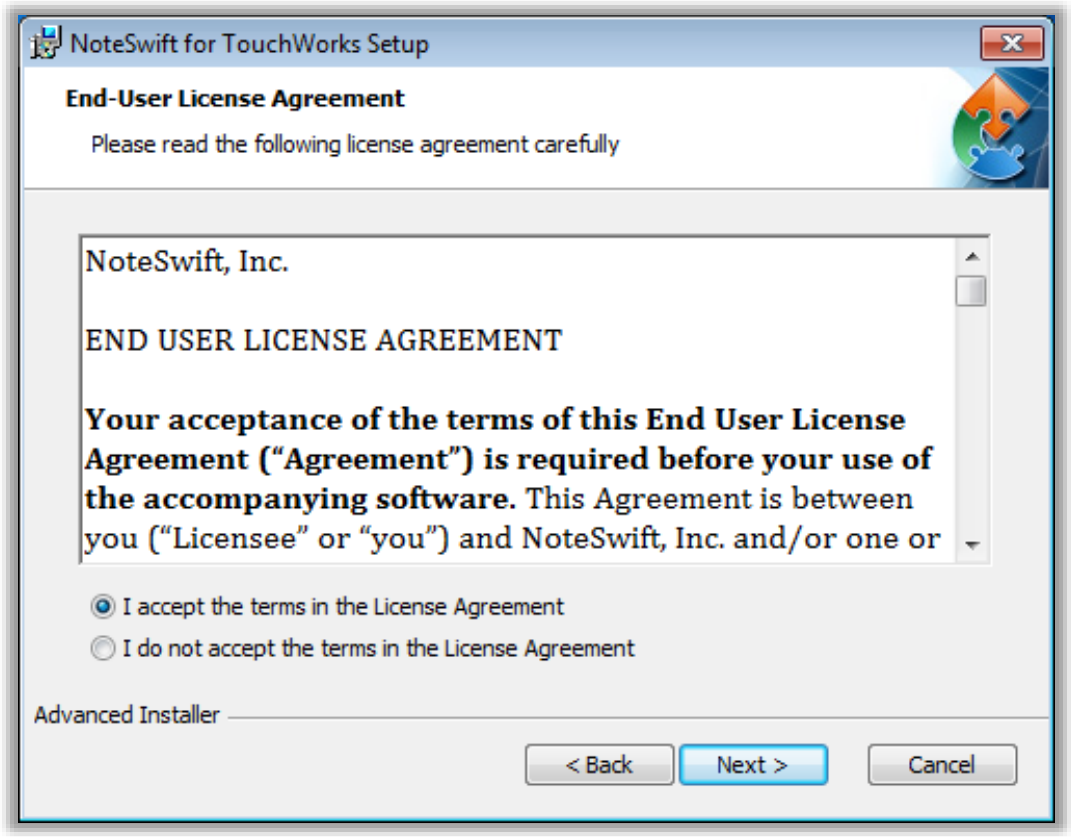
Installation

Note: NoteSwift requires Microsoft .Net Framework 4.0 in order to run properly. It is assumed that Dragon is already installed and running on your system, which also requires that .NET be installed.

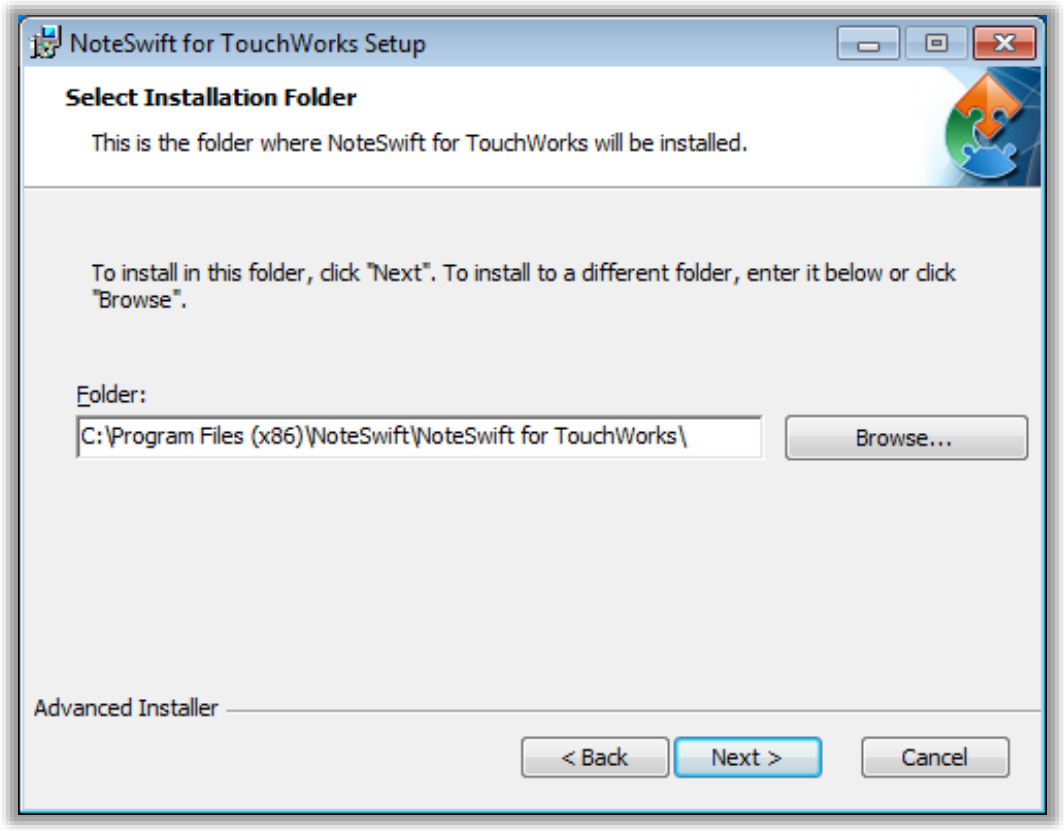
The Welcome dialog appears. Click Next.

NoteSwift for TouchWorks Setup
Welcome to the NoteSwift for TouchWorks Setup Wizard
The Setup Wizard will install NoteSwift for TouchWorks on your computer. Click "Next" to continue or "Cancel" to exit the Setup Wizard.
< Back
Next >
Cancel

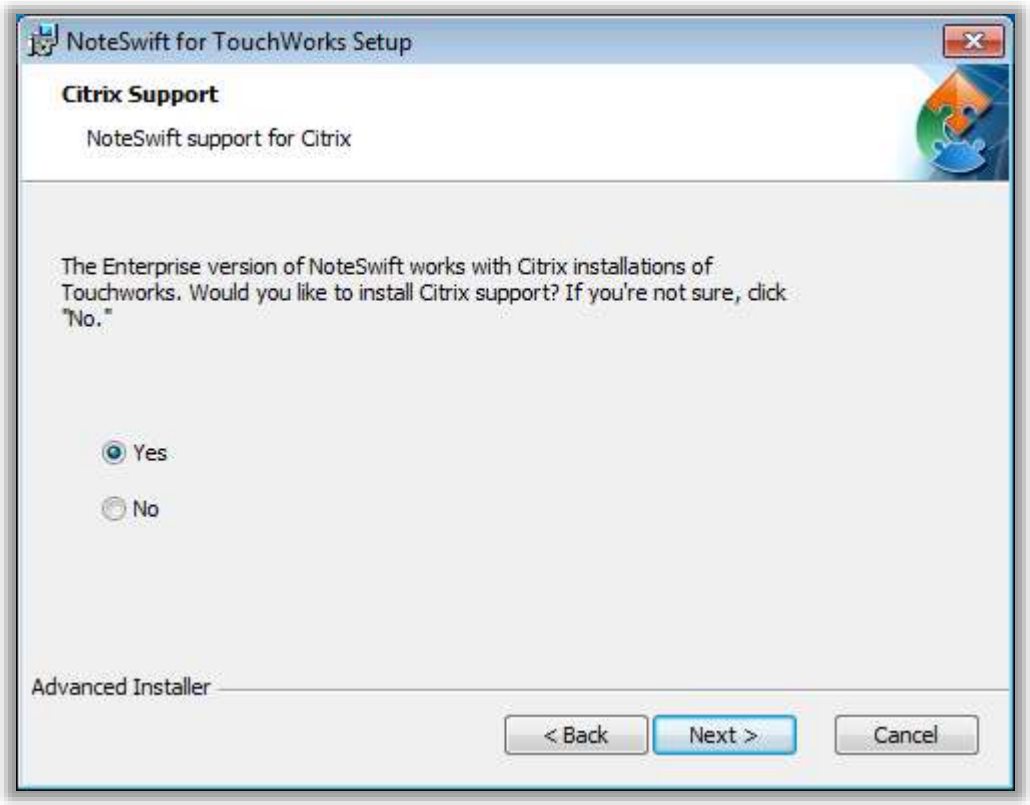
Accept the NoteSwift for TouchWorks End User License Agreement and click Next.

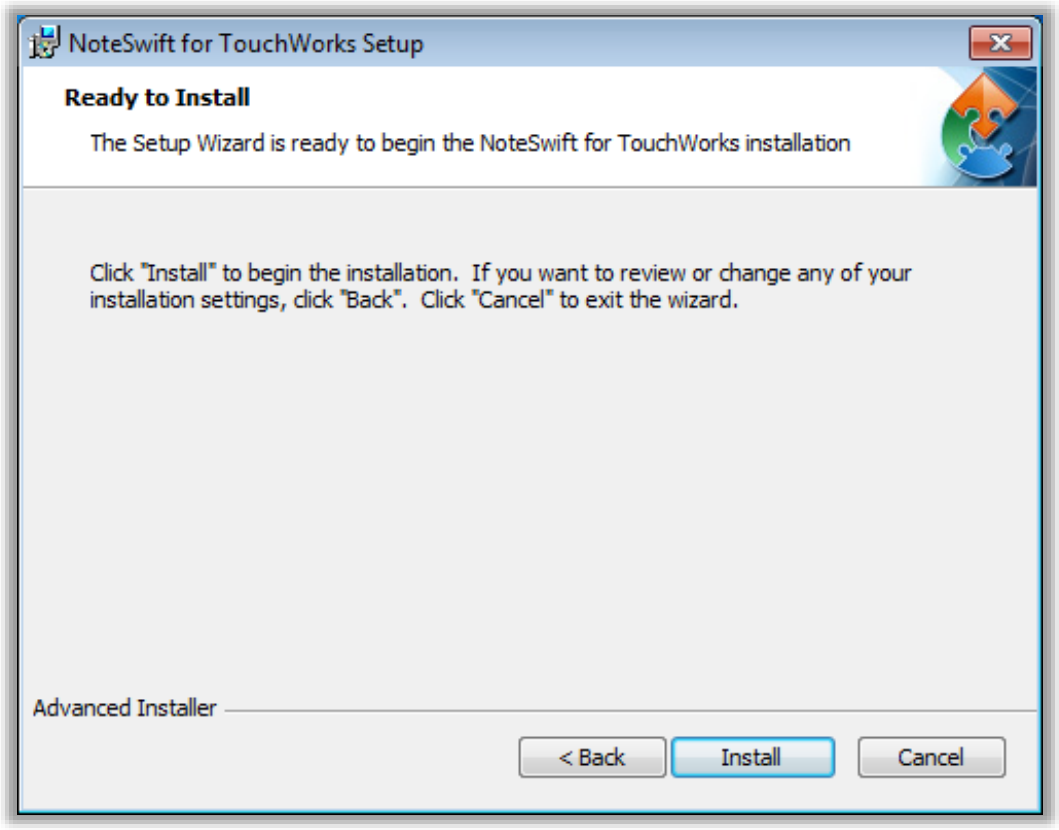

NoteSwift for TouchWorks Setup
End-User License Agreement
Please read the following license agreement carefully
NoteSwift, Inc.
END USER LICENSE AGREEMENT
Your acceptance of the terms of this End User License Agreement ("Agreement") is required before your use of the accompanying software. This Agreement is between you ("Licensee" or "you") and NoteSwift, Inc. and/or one or
I accept the terms in the License Agreement
I do not accept the terms in the License Agreement
Advanced Installer
< Back
Next >
Cancel

You will be asked where to install the files. Select the default location and click Next.

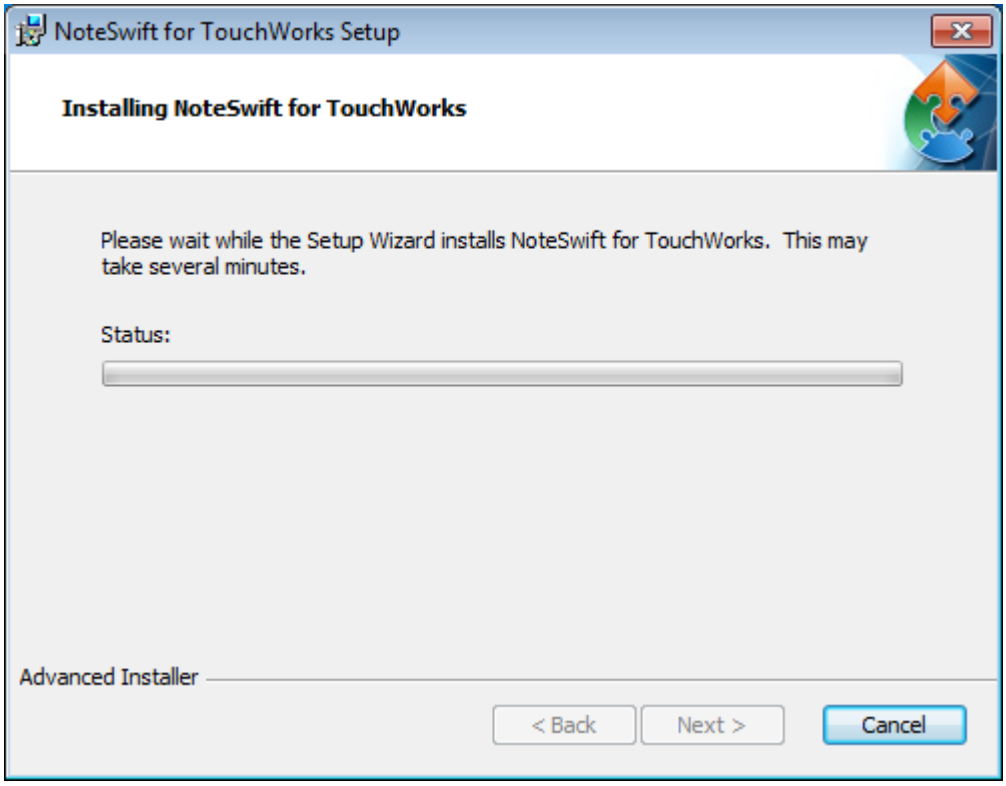

NoteSwift for TouchWorks Setup
Select Installation Folder
This is the folder where NoteSwift for TouchWorks will be installed.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Folder:
C:\Program Files (x86)\NoteSwift\NoteSwift for TouchWorks\
Browse...
Advanced Installer
< Back
Next >
Cancel

You will be asked whether you require support for running NoteSwift with Citrix installaions of Touchworks. Citrix is selected by default. If you are sure that you will not be running with TouchWorks on Citrix, you may click No.


NoteSwift for TouchWorks Setup
Citrix Support
NoteSwift support for Citrix
The Enterprise version of NoteSwift works with Citrix installations of Touchworks. Would you like to install Citrix support? If you're not sure, click "No."
Yes
No
Advanced Installer
< Back
Next >
Cancel


NoteSwift for TouchWorks Setup
Ready to Install
The Setup Wizard is ready to begin the NoteSwift for TouchWorks installation
Click "Install" to begin the installation. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.
Advanced Installer
< Back
Install
Cancel

Click the Install button to begin the NoteSwift installation. You will see a progress dialog as the files are installed.


NoteSwift for TouchWorks Setup
Installing NoteSwift for TouchWorks
Please wait while the Setup Wizard installs NoteSwift for TouchWorks. This may take several minutes.
Status:
Advanced Installer
< Back
Next >
Cancel

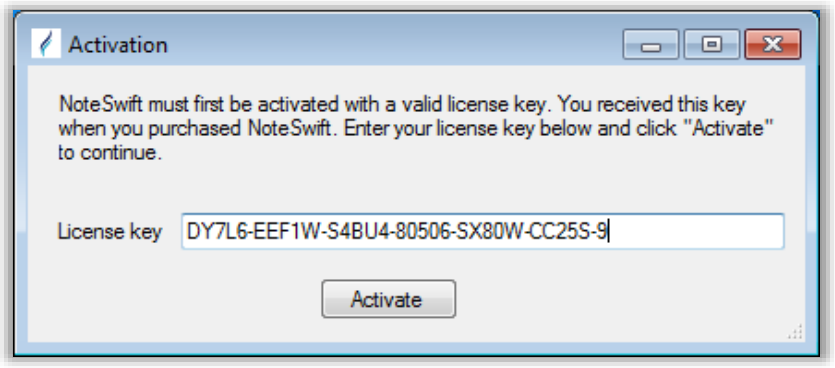
NoteSwift for TouchWorks Setup
Completing the NoteSwift for TouchWorks Setup Wizard
Click the "Finish" button to exit the Setup Wizard.
< Back
Finish
Cancel

Once the installation is complete, click the Finish button. Future updates will be delivered automatically to you each time you start NoteSwift.

If you have installed with Citrix support, you will be asked to restart your computer in order for the Citrix support to take effect. Once your system has restarted, run NoteSwift to continue with activation and registration. Remember: you must have Dragon Medical running in order to launch NoteSwift!

Activating Your Product

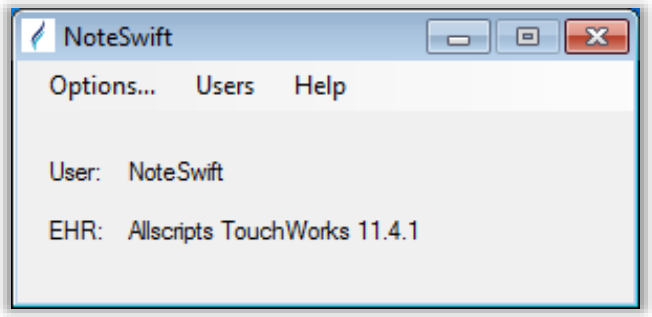
When this dialog appears, enter your NoteSwift License key and click Activate.


Activation
NoteSwift must first be activated with a valid license key. You received this key when you purchased NoteSwift. Enter your license key below and click "Activate" to continue.
License key
DY7L6-EEF1W-S4BU4-80506-SX80W-CC25S-9
Activate

You will then be asked to register your product with NoteSwift. You are required to fill out all the information and click Register.

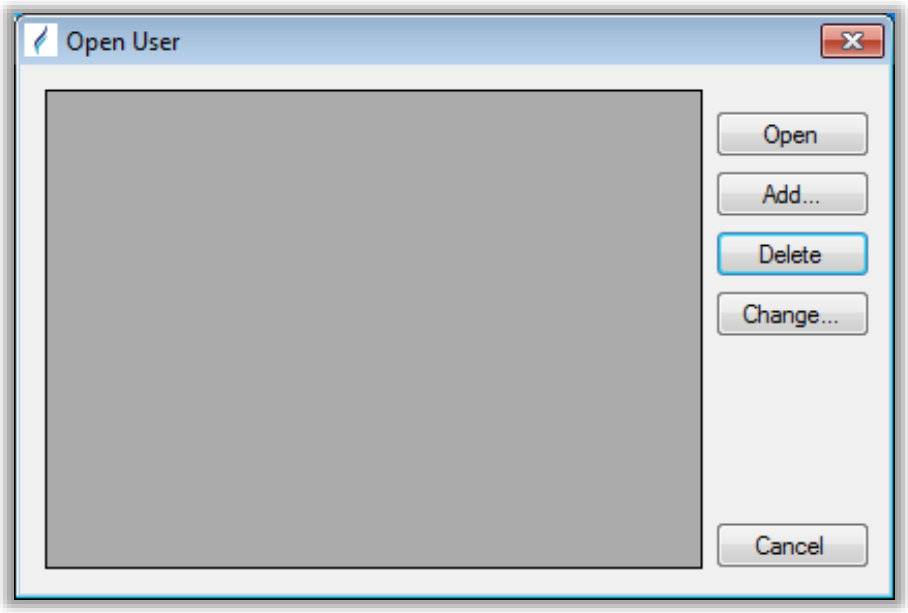
You must be on the internet for the activation and registration phase of installation. You will not be able to activate your copy of NoteSwift, otherwise!

After activation and registration is complete, NoteSwift will launch and you will need to create a user profile.



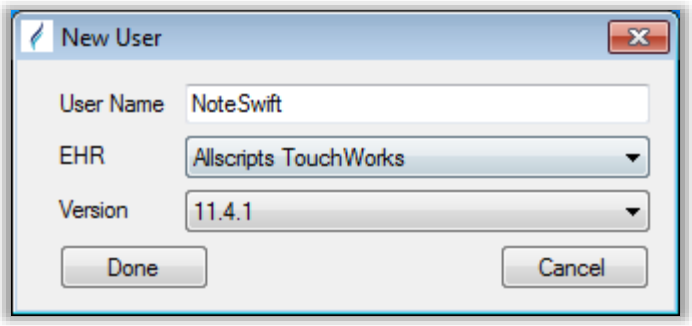
Create a User Profile

When NoteSwift first opens, it asks you to create a New User profile. Click Add to create this new profile.



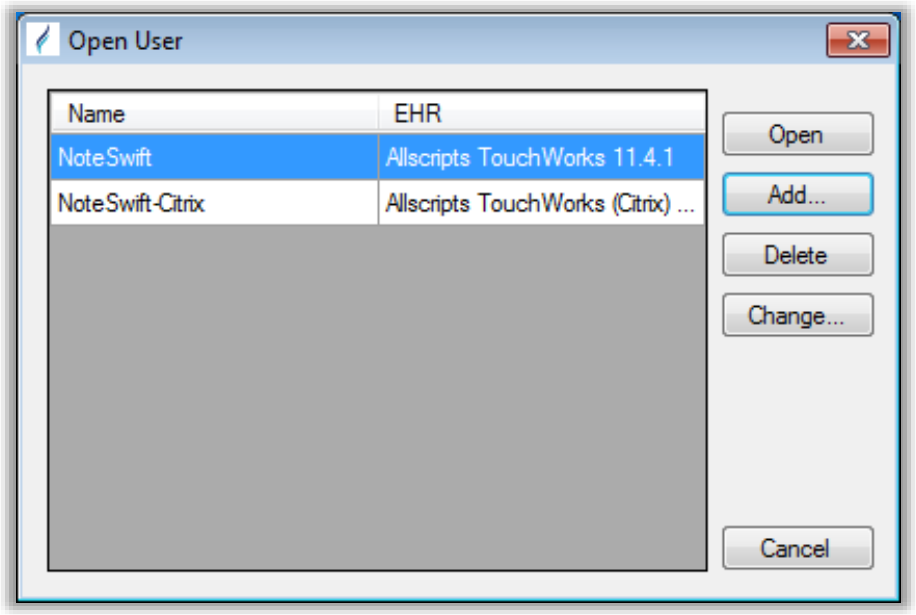
In the subsequent dialog that appears:

- Enter your user name in the User Name field.
- Select the appropriate EHR (Touchworks vs. Citrix) from the drop down menu.
- Select the correct version of Touchworks you are running.

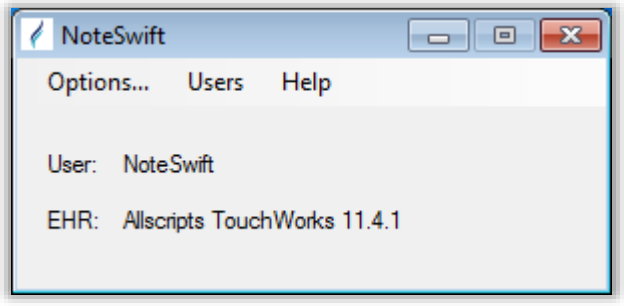


Click Done when finished.

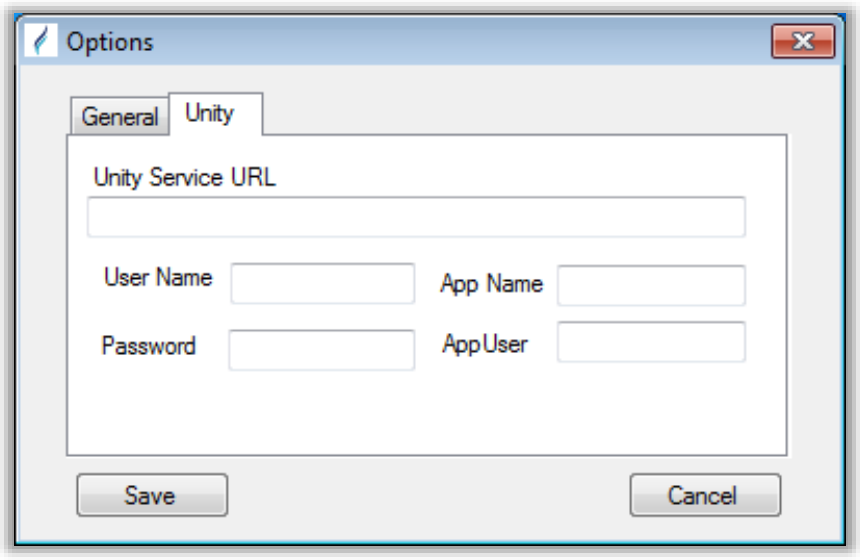
Open the user profile you just created by highlighting the name and clicking the Open button.



This is how NoteSwift looks once you've launched it and selected a user:



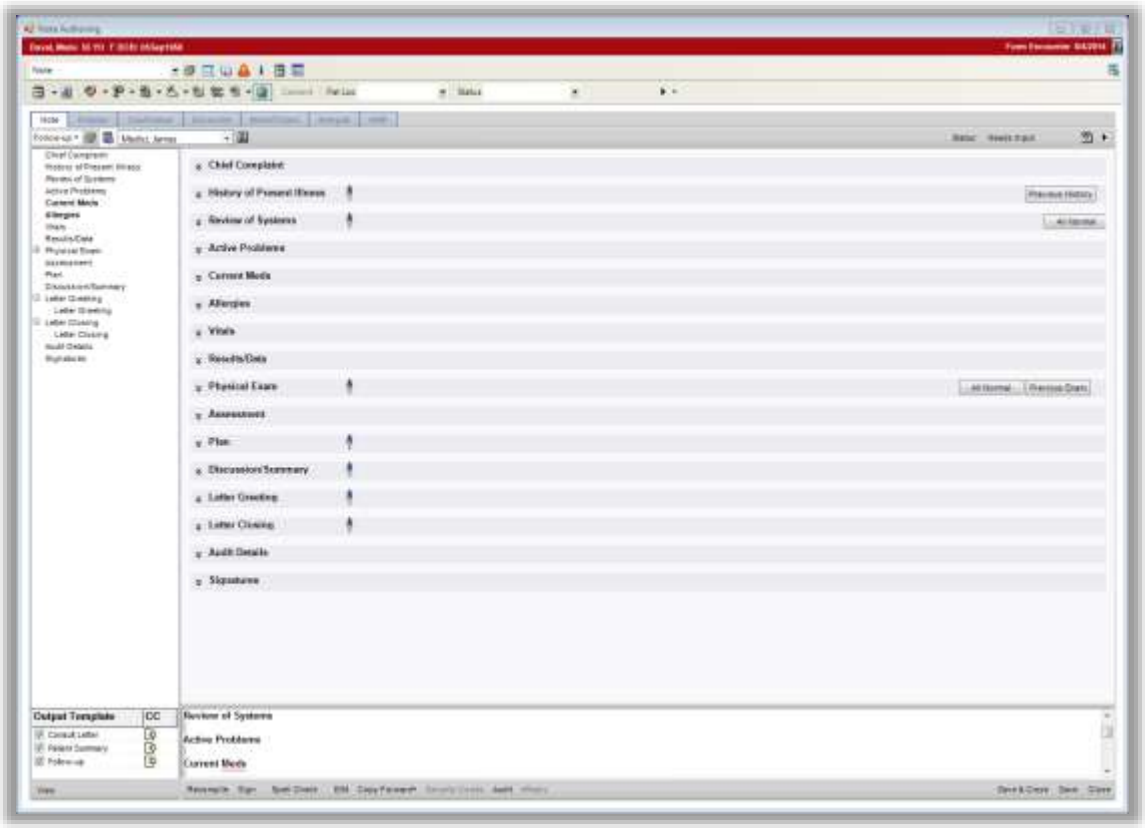
Prior to working with Touchworks, select NoteSwift Options…, and click on the Unity Tab. You or your system administrator will need to enter the Unity Service information for your installation.



Click Save and you are ready to begin working with NoteSwift. You may minimize NoteSwift during operation.

The TouchWorks® Note Window

The following shows the starting point within Touchworks for entering the patient note with NoteSwift:



NoteSwift Forms

NoteSwift allows you to dictate free text narrative, or structured data where NoteSwift does the searching for you from a defined list. In this document we go through a typical EHR note and show you how SwiftNav™ technology helps you create the patient note quickly and easily whether you need free text or structured data.

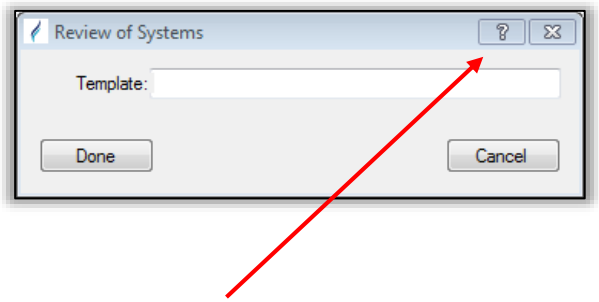
NoteSwift commands are available for the following categories:

- History of Present Illness
- Review of Systems
- Active Problems
- Past Medical History
- Surgical History
- Family History
- Social History
- Current Meds
- Allergies
- Physical Exam
- Prescribe
- Orders

Note: There are also two specialized NoteSwift forms:

- ROS Template
- Exam Template

For a complete listing of all NoteSwift commands, please refer to the NoteSwift Command Cheat Sheet located at the end of this manual.



The Question mark at the top right hand corner of the NoteSwift Windows is there to help you if you have questions. Click on this to see the NoteSwift Help Menu.

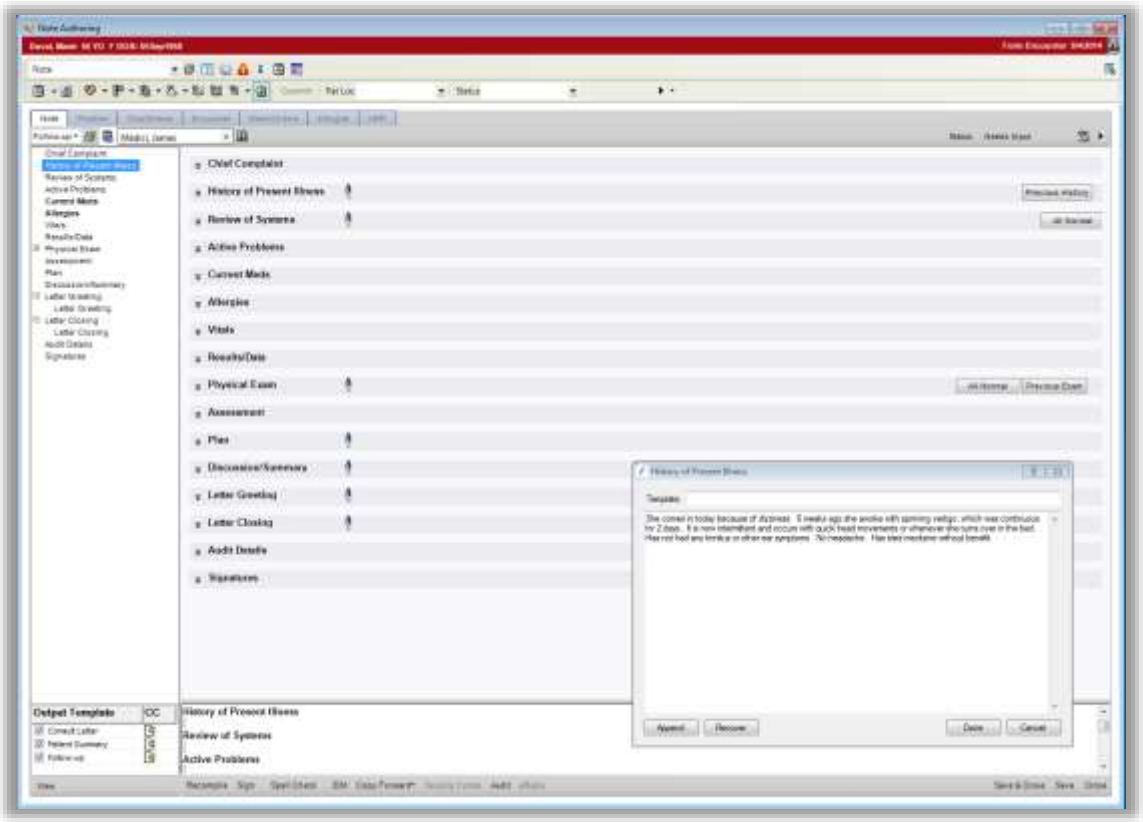
Position NoteSwift forms so they do not obscure TouchWorks window or dialog buttons. NoteSwift in some cases may not be able to enter the data properly if TouchWorks dialog buttons are covered by the NoteSwift form.

History of Present Illness

Call up the History of Present Illness window. Say **HPI.**

The History of Present Illness window appears. Dictate the patient's history. For example:

She comes in today because of dizziness. 6 weeks ago she awoke with spinning vertigo, which was continuous for 2 days. It is now intermittent and occurs with quick head movements or whenever she turns over in the bed. Has not had any tinnitus or other ear symptoms. No headache. Has tried meclizine without benefit.



Specify punctuation as you dictate, as in ***... she awoke with spinning vertigo comma which was continuous for 2 days period****.*

The words you dictated appear in the HPI window. To transfer the data to the Note Section of TouchWorks HPI do ONE of these things:

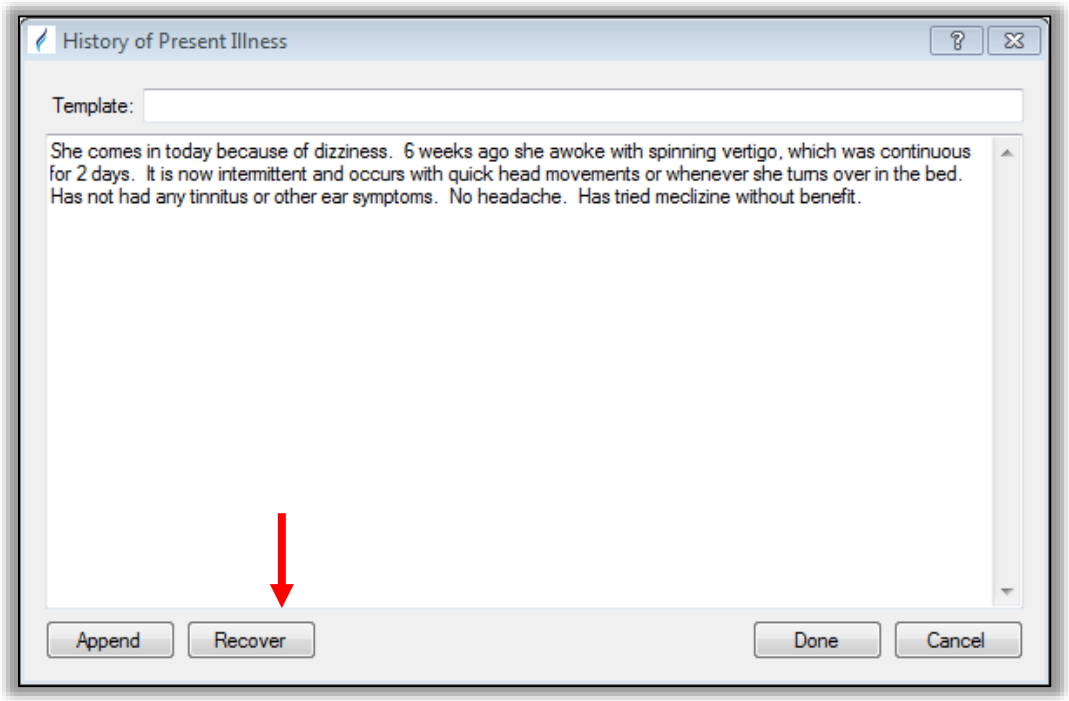
- Use a hotkey to click the Next or Done button.
- Say **Done.**
- Say the name of the next window you wish to go to, such as **ROS**.

If you have one or more HPI templates loaded, you may also use the power command ***Previous History*** *to load the previous history, for one or all templates. More about this in ROS Templates.*

Other Commands in the HPI Window

There are other helpful commands within the HPI window: Recover and Append.

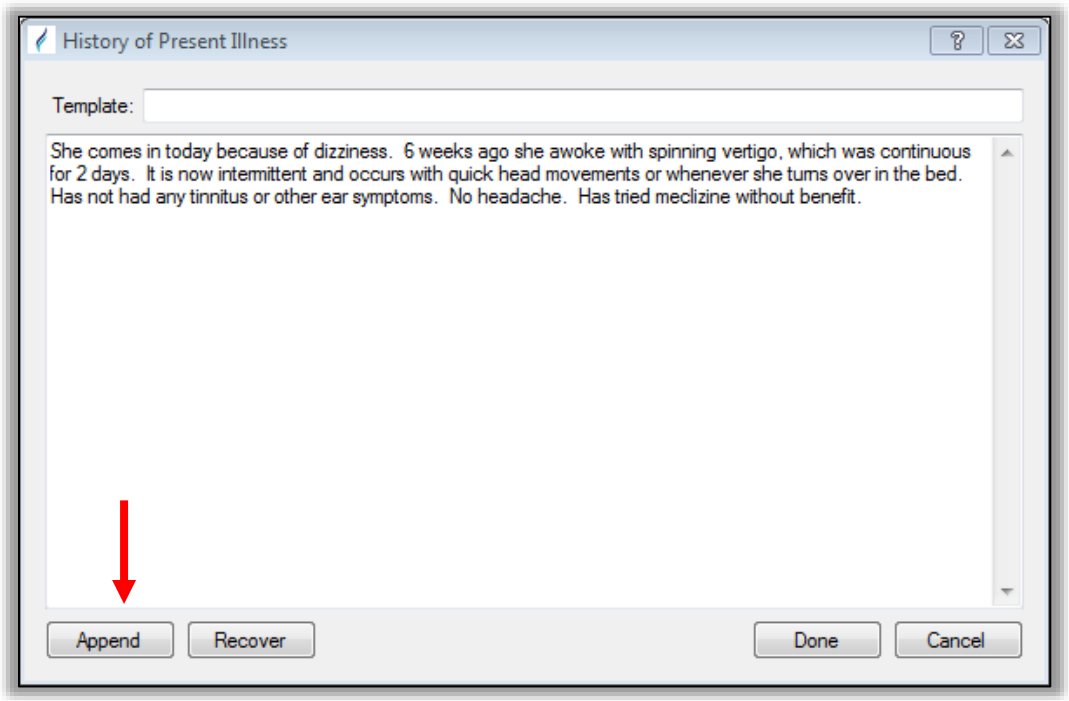
Recover brings back text from a previous HPI dictation. This is useful if the text was lost. To recover lost text or text that was not transferred say **HPI, Recover**.


History of Present Illness
Template:
She comes in today because of dizziness. 6 weeks ago she awoke with spinning vertigo, which was continuous for 2 days. It is now intermittent and occurs with quick head movements or whenever she turns over in the bed. Has not had any tinnitus or other ear symptoms. No headache. Has tried meclizine without benefit.
Append
Recover
Done
Cancel

Append

Append moves the cursor to the end of existing text and adds additional dictattion to the end of previously dictated notes. This is useful if you have already dictated the HPI and need to add additional information.

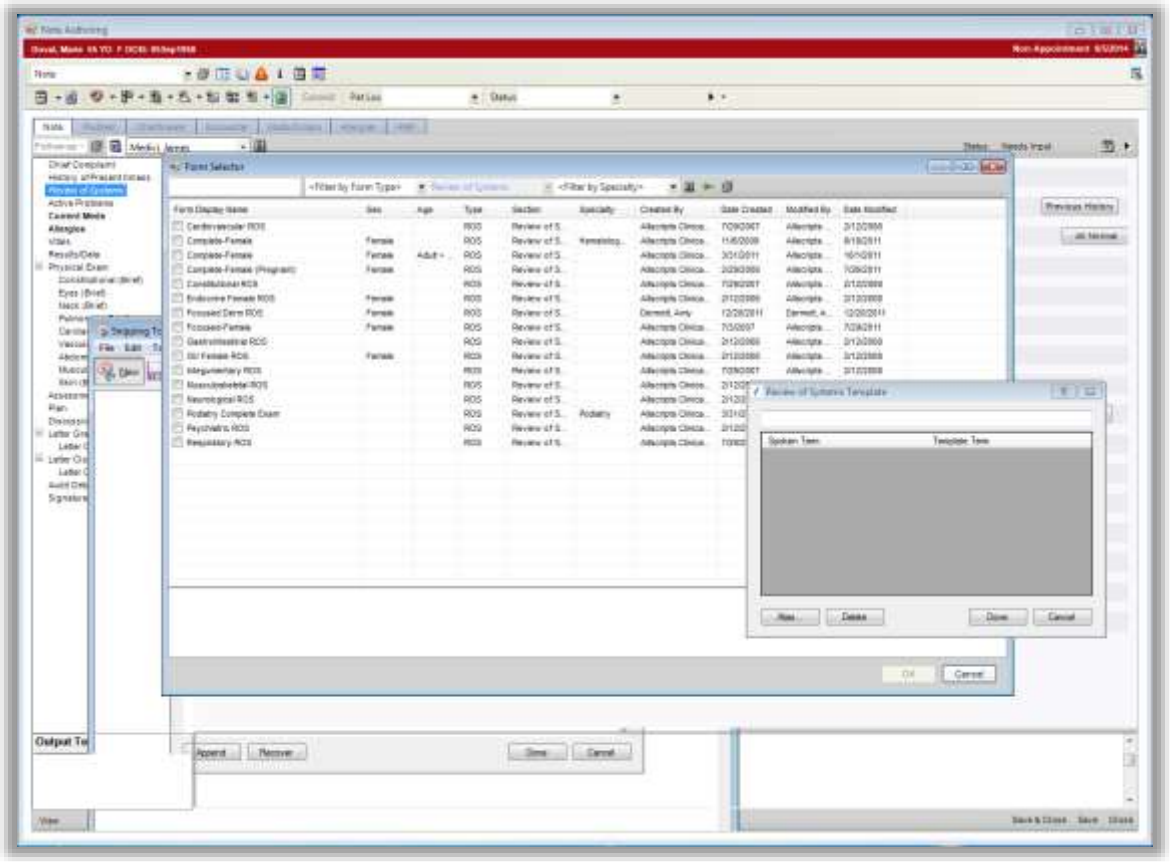
To do this from the HPI window, say Append, and continue with your dictations. If the HPI window is not open, sayHPI, Append. And continue your dictation.


History of Present Illness
Template:
She comes in today because of dizziness. 6 weeks ago she awoke with spinning vertigo, which was continuous for 2 days. It is now intermittent and occurs with quick head movements or whenever she turns over in the bed. Has not had any tinnitus or other ear symptoms. No headache. Has tried meclizine without benefit.
Append
Recover
Done
Cancel

ROS Templates and ROS Aliases

The NoteSwift ROS template form is used to quickly load ROS templates into your note. It also allows you to create aliases for the ones you use most, providing a quick and convenient way to find and load them. An alias is a custom name for your templates. To create an ROS alias, say

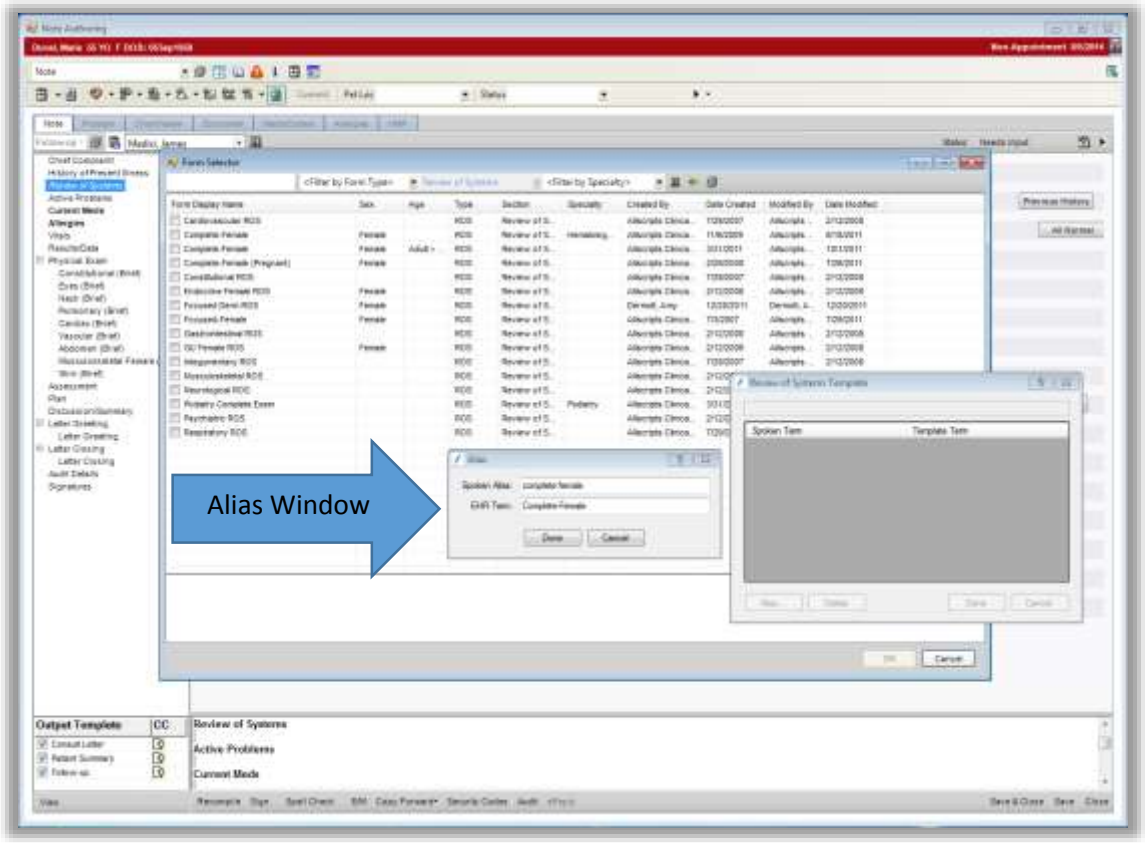
ROS Templates



NoteSwift brings up the Touchworks Form Selector window, and then the ROS Template form appears. Say **Alias** to bring up the alias window.

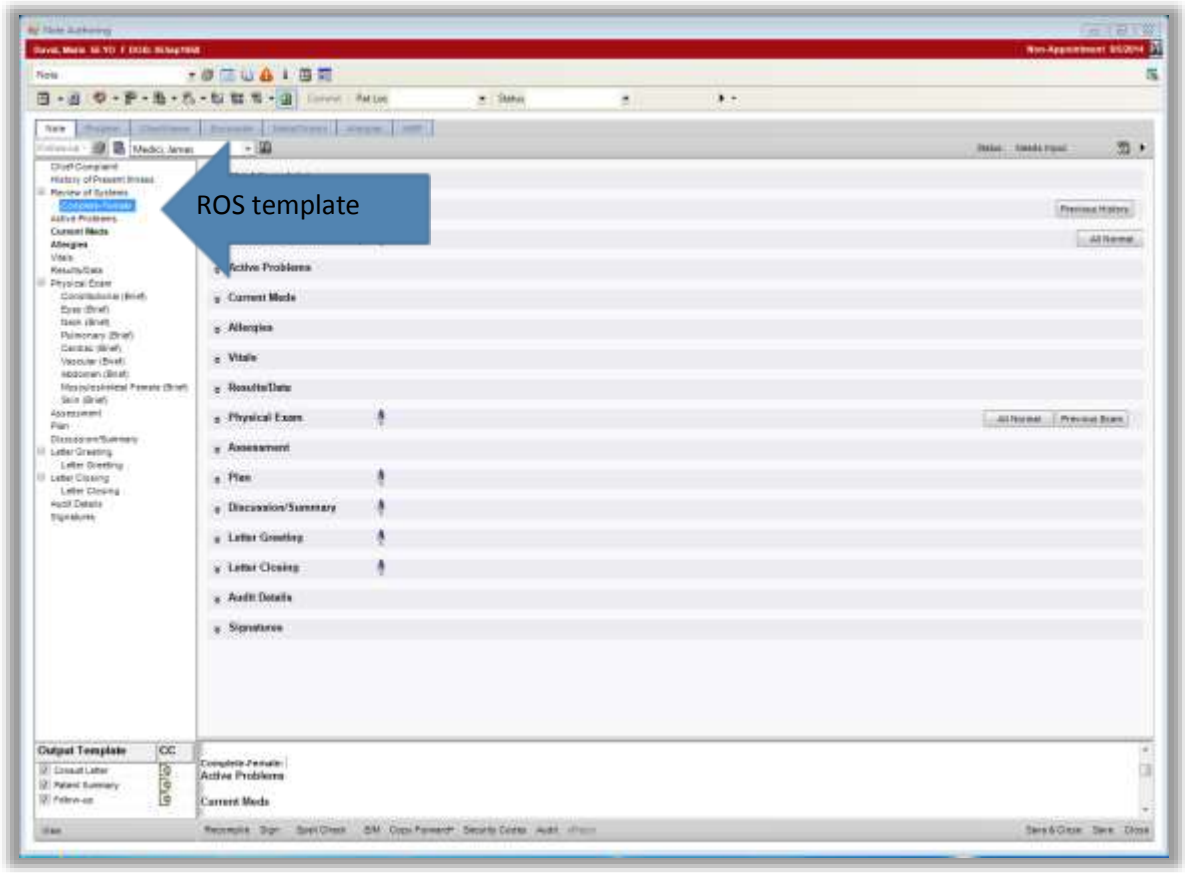
Using the list displayed in the TouchWorks Form Selector window, type or dictate the spoken name of the desired ROS template. The spoken name can be anything you wish, however, the EHR Term needs to match exactly what is written in the Form Selector.

Click or say **Done** to register the alias.



The aliases you create are retained between NoteSwift sessions for use in future patient encounters. In the example above, a spoken Alias of “complete female” corresponds with the TouchWorks Template “Complete-Female”. To test out the new Alias say **Complete Female, Done.**

You should see the template load and appear under Review of Systems.



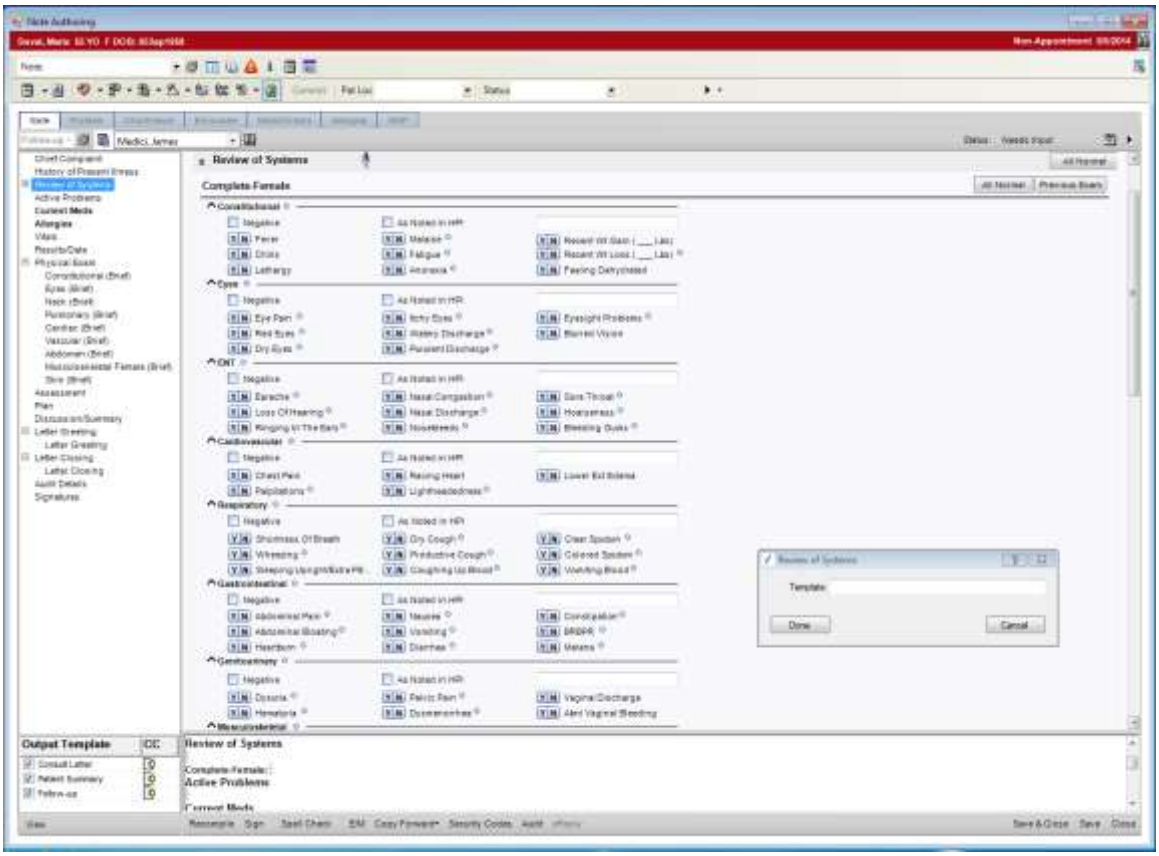
NoteSwift searches within the Touchworks Form Selector window for the first match from the ROS Template string or alias. A best practice for working with NoteSwift is to make sure that all your template names are uniquely named.

While not covered in this tutorial, the NoteSwift Exam Templates form which is used to create aliases for, and load exam templates exactly the same way as for ROS Templates.

Review of Systems

Call up the ROS window. Say **ROS.**

The NoteSwift ROS window appears. You may have one or more ROS templates loaded into your note. NoteSwift allows you to use several power commands in ROS:



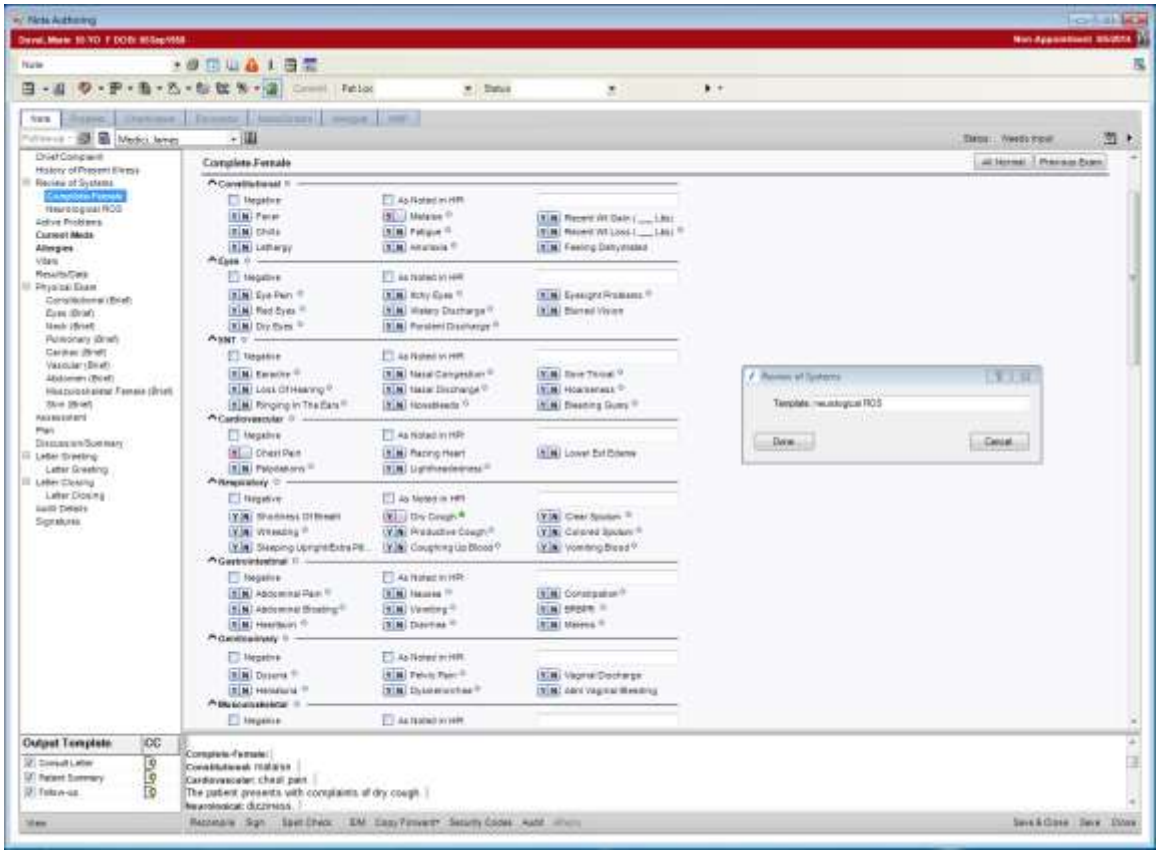
Say **All Normal** or **Previous Exam**.

NoteSwift will set predefined normal defaults or import results from the prior exam for *all* loaded templates in the note. If you would like to set individual templates to either **All Normal** or **Previous Exam**, you would first dictate the name of the template in the template field followed by the command. For example, say **Complete Female, Previous Exam to** load in the information that was entered in the Complete-Female template from the prior examination.

If you had two templates loaded, for example Complete-Female and Neurological ROS, you could now say

Neurological ROS, All Normal.

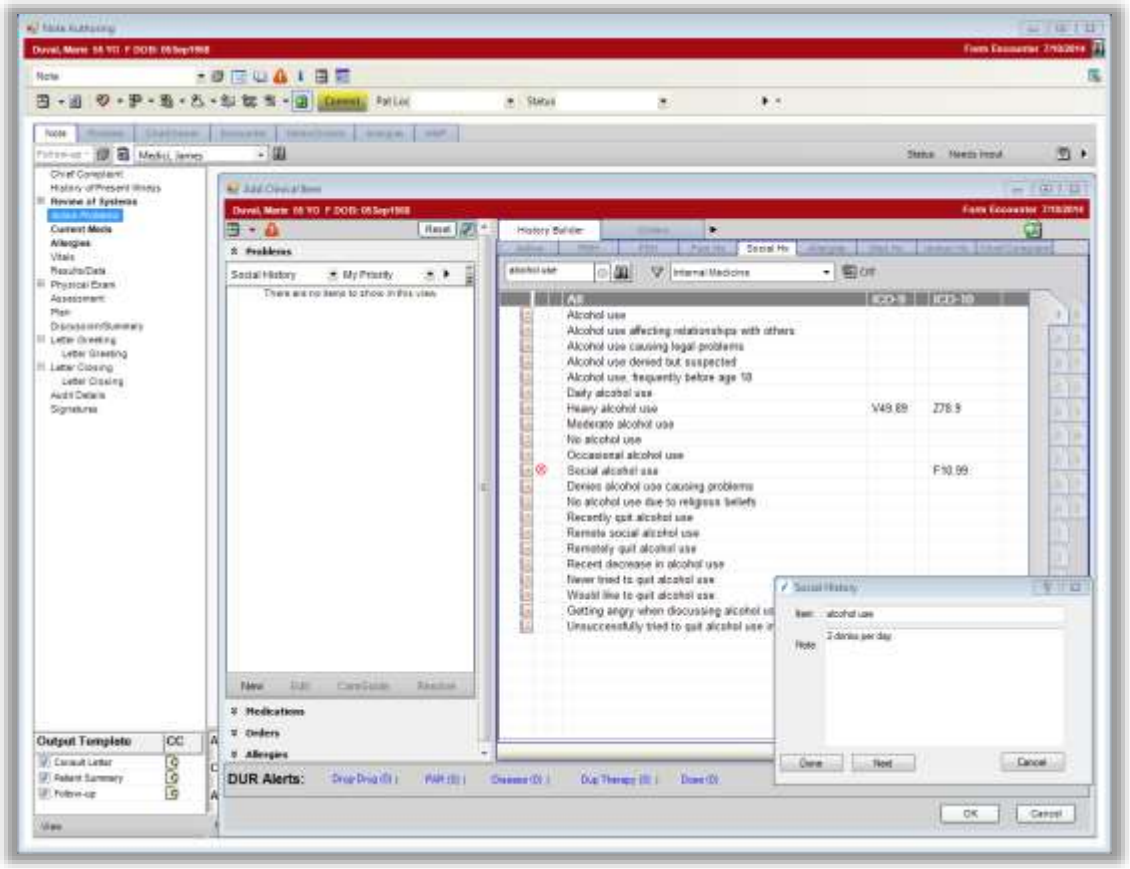
The “normal” defaults for the information in the Neurological template only will be loaded, and added to the accumulator.



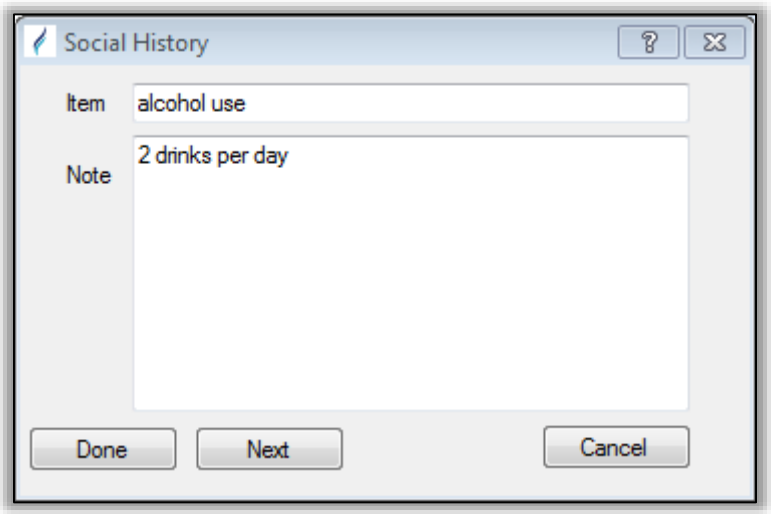
*You can also use **All Normal** and **Previous Exam** power commands with the NoteSwift **Exam** form, just like Review of Systems. Additionally, for **HPI** you may specify **Previous History,** which will load in the history from a prior exam. Because these are power commands, you will also notice that you don’t have to say **Next**, the operation happens as soon as NoteSwift recognizes the power command.*

Social History

Call up Social History. Say **Social History.**


Alcohol use
Alcohol use affecting relationships with others
Alcohol use causing legal problems
Alcohol use denied but suspected
Alcohol use, frequently before age 10
Daily alcohol use
Heavy alcohol use
Moderate alcohol use
No alcohol use
Occasional alcohol use
Social alcohol use
Denies alcohol use causing problems
No alcohol use due to religious beliefs
Recently quit alcohol use
Remote social alcohol use
Remotely quit alcohol use
Recent decrease in alcohol use
Never tried to quit alcohol use
Would like to quit alcohol use
Getting angry when discussing alcohol
Unsuccessfully tried to quit alcohol use
Output Template
DUR Alerts:
OK
Cancel

Dictate the Social History item, followed by details:



Say **Alcohol Use, 2 drinks a day**

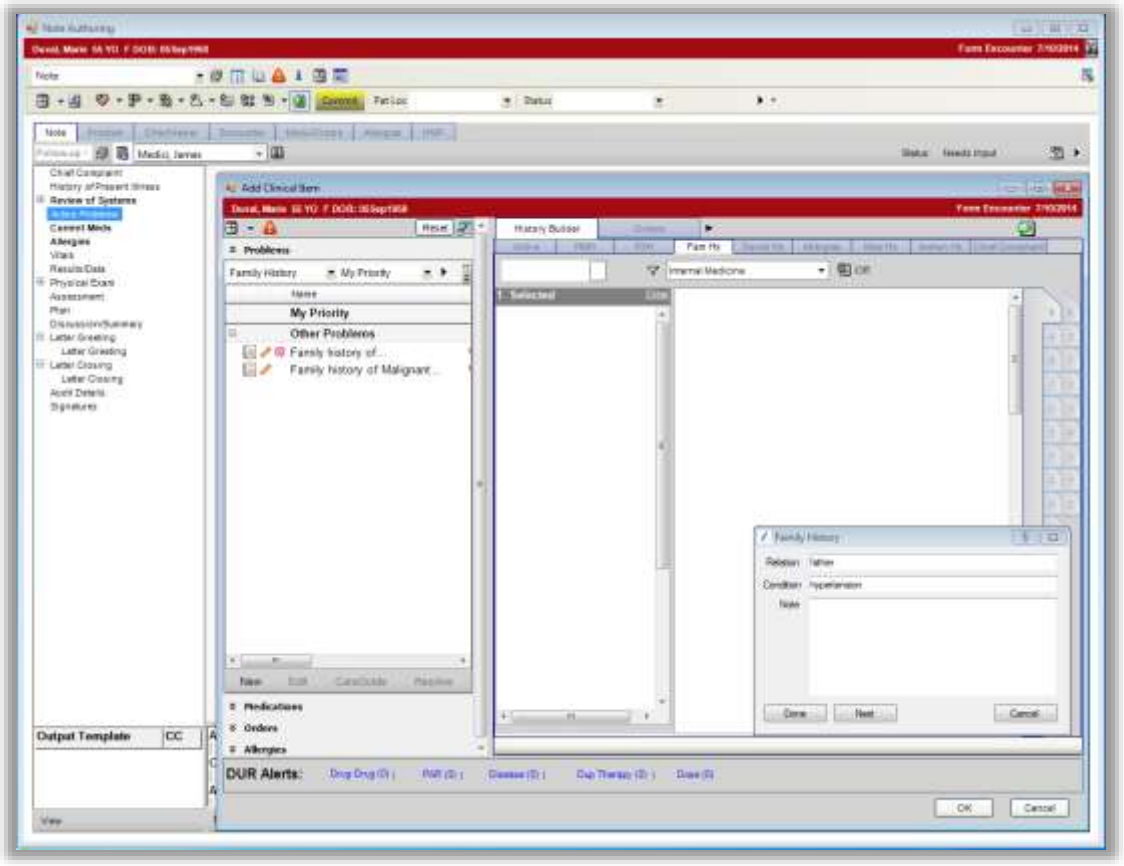
Remember that the comma means to pause after the first word, which tells NoteSwift to auto-jump™ to the next form field).

To add additional items, click or say **Next** and continue dictating. When you are finished, click or say **Done** or proceed to the next category.

Surgical History and Medical History *are two additional NoteSwift forms, though not used in this tutorial, behave very much like* ***Social History****.*

Family History

Call up the family history window. Say **Family History.**



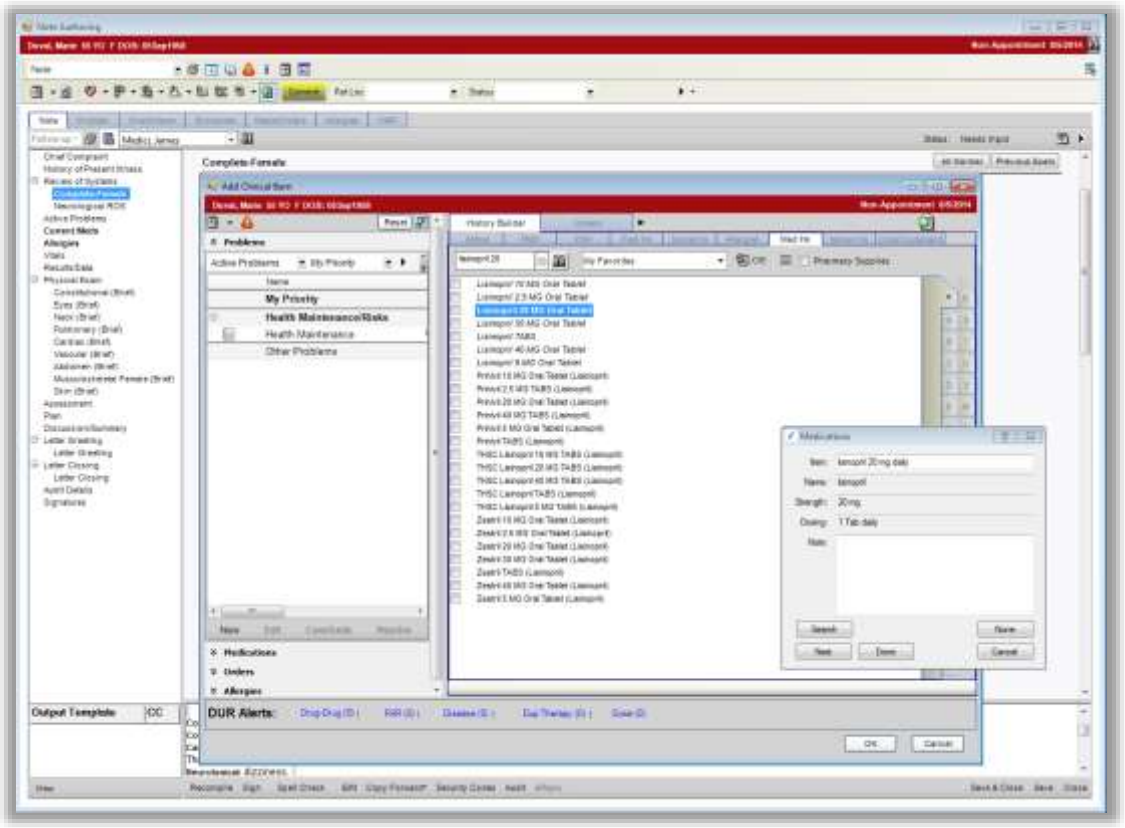
Say **Father, hypertension.**

Press the Next button or say **Next** if other family history items need to be added. The history item is transferred and you are ready to dictate another item.

When all items are added click the Done button or say **Done.** You can also say another category, such as **Medical History** to move to that window.

Medication History

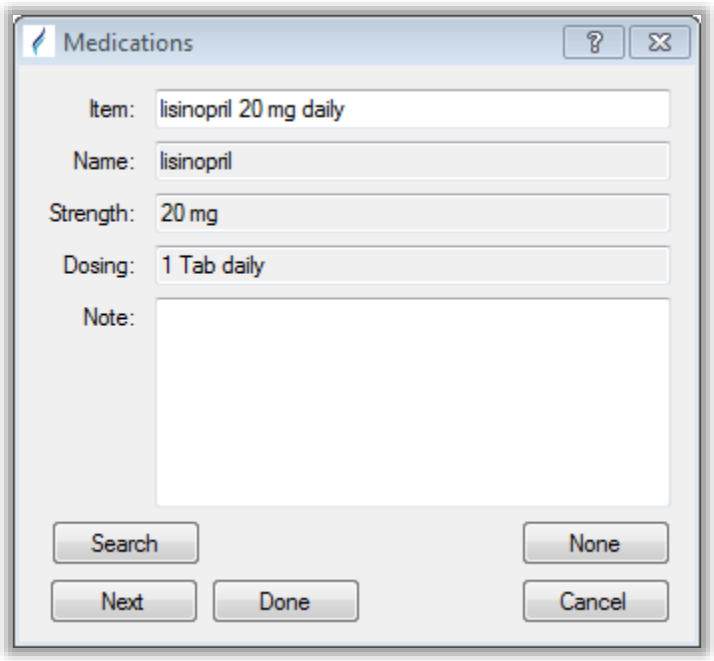
Call up the Medications History form. Say **Medications.**



Dictate the medications your patient is taking.

Say **Lisinopril 20 mg daily**

NoteSwift parses the data and puts the information in the right place, Drug name, Strength, Dosing. Say Next to enter the data.



If you would like to choose from a list of medications, simply say the name of the drug.

Say **Ambien**, **Search**

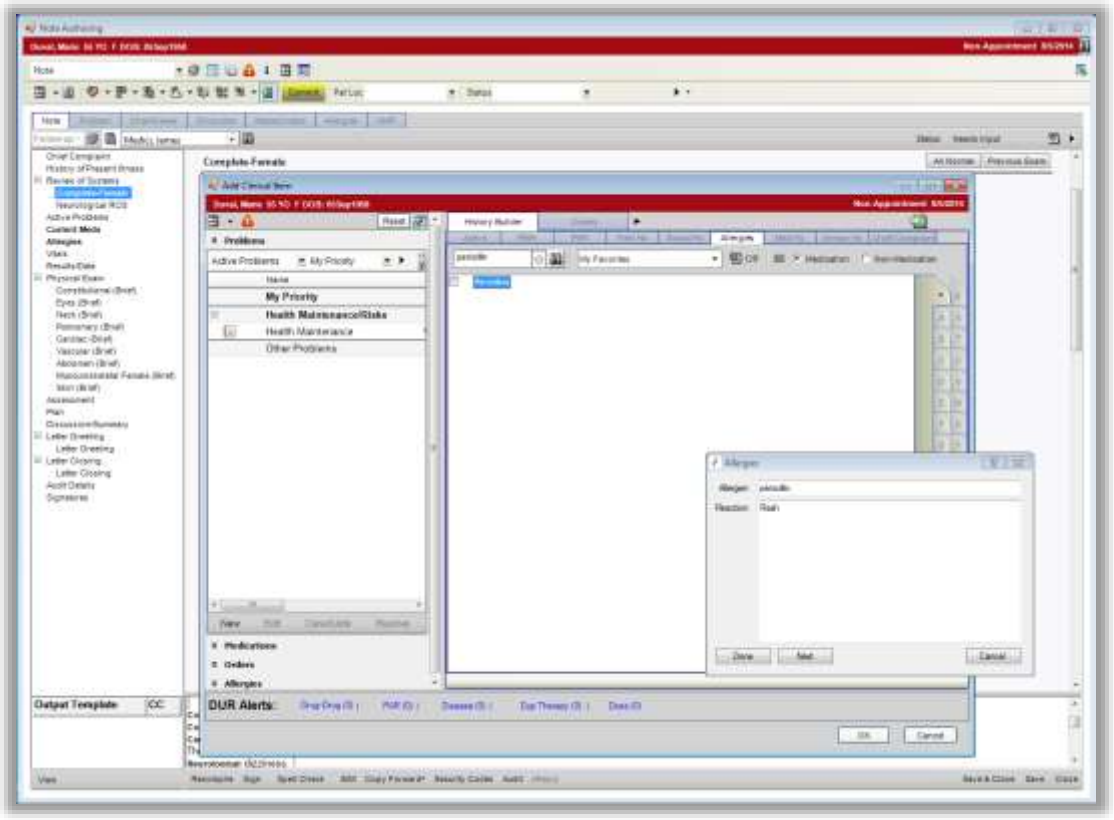
You will be put at the head of the list of options for Ambien, then you can select the correct one by saying the dosage, for example, **5 MG**
Then, say **Next** to add additional medications if you wish.

Say **Done** when you are done, or say the next category you wish to navigate to, such as **Allergies**.

Allergies

Call up the Allergies window.

Say **Allergies**



Dictate your patient's allergies.

Say **Penicillin, Rash**

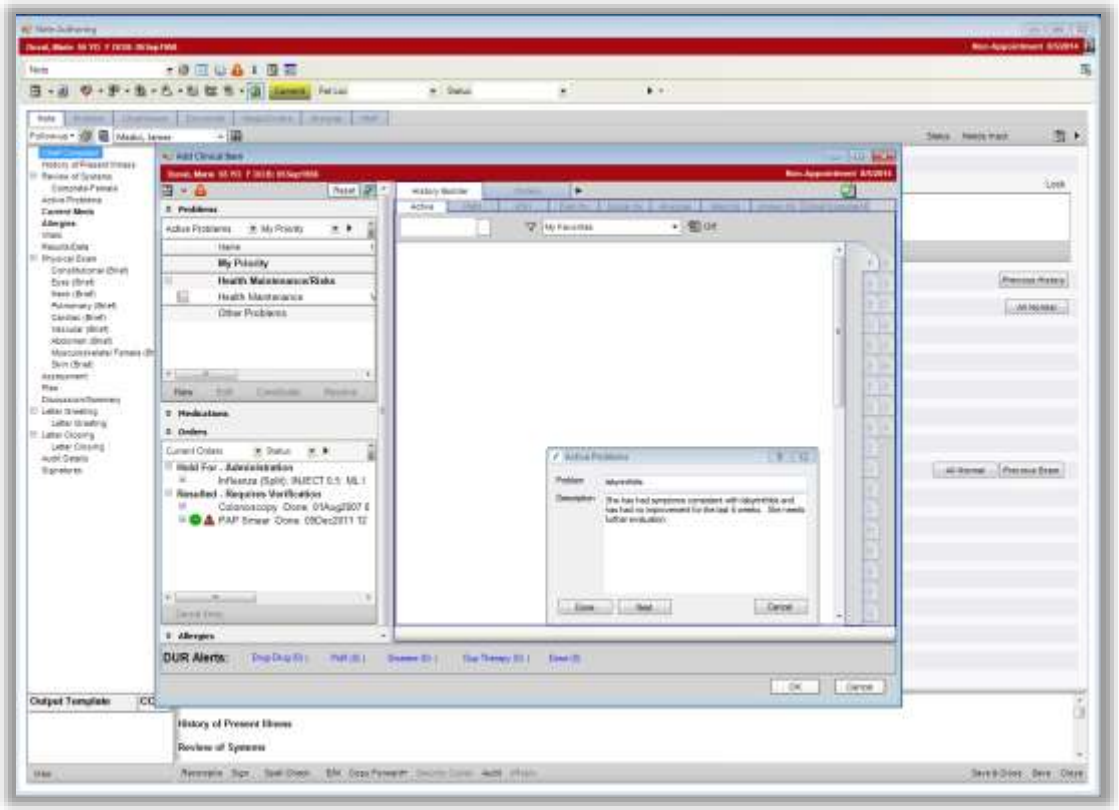
Then, say **Next** to add more allergies, then **Done** when you are finished. Or say the next category you wish to navigate to, such as **Active Problems**.

*You can also dictate allergic reactions in a list, such as **Hives, Rash**. You would dictate that as **Hives-comma-Rash** into the Reaction field of the NoteSwift form.*

Active Problems

Bring up the Active Problems window.

Say **Active Problems**

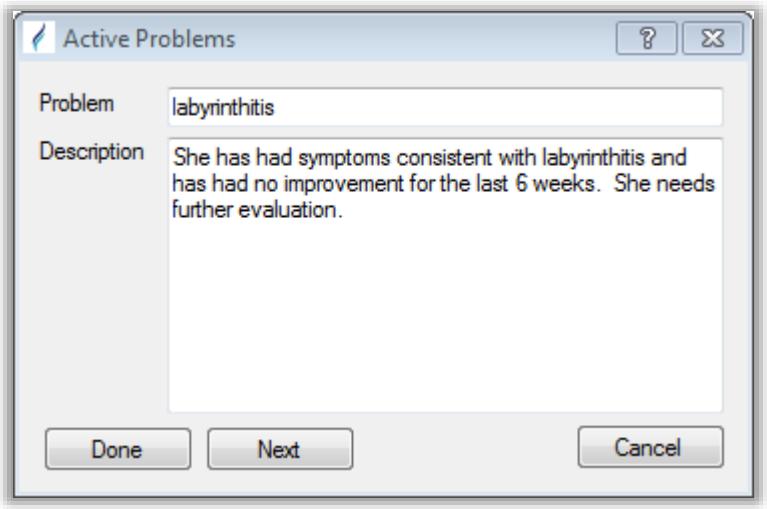


Dictate your patient's active problems.

Say **Labyrinthitis**

Dictate a description of the problem using your own text, or use the sample text below:

The patient has had symptoms consistent with labyrinthitis and has had no improvement in the last 6 weeks. She needs further evaluation.

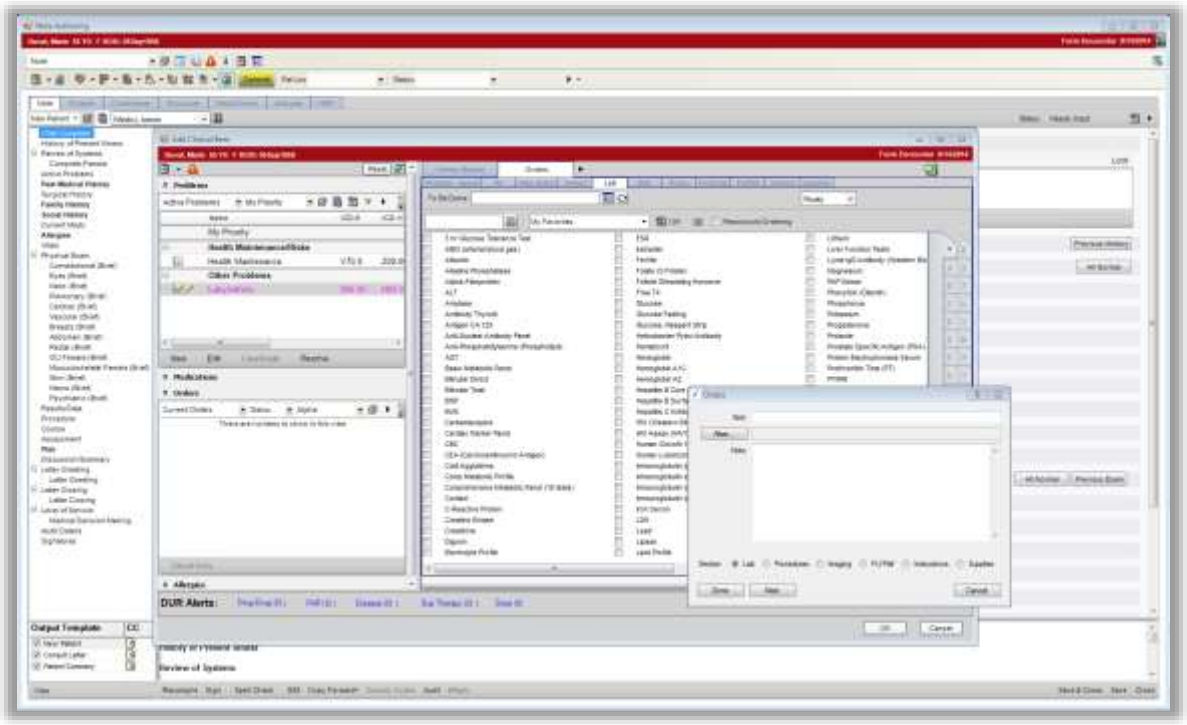


Say or click **Next** to add more active problems, **Done** when you are done, or say the next category you wish to navigate to, such as **Orders**.

Orders

Bring up the Orders window.

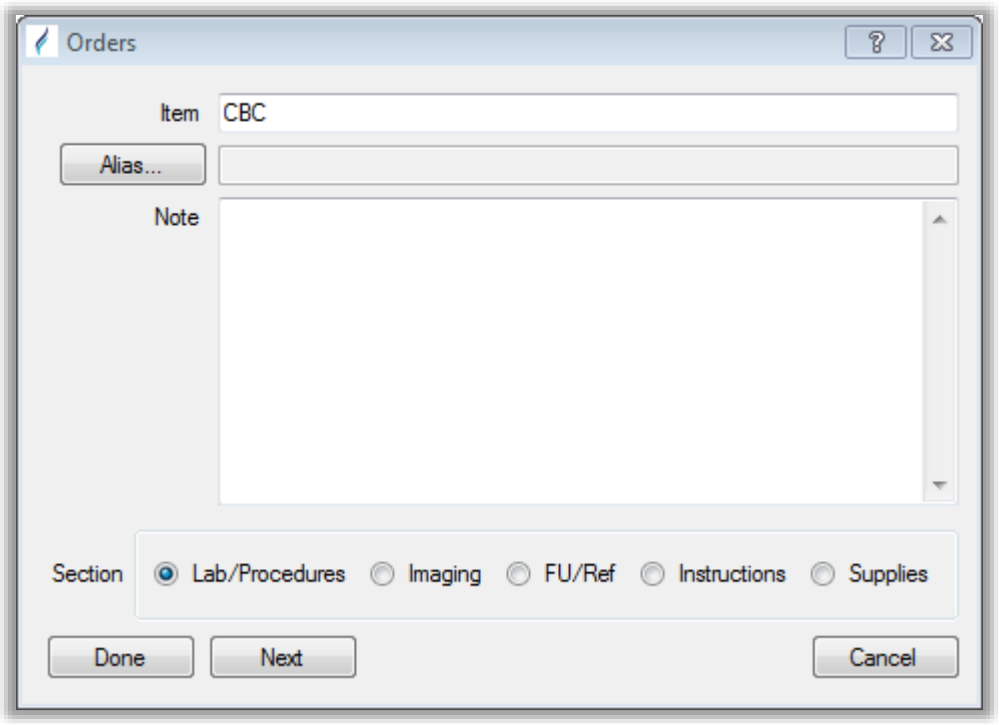
Say **Orders**



Here you specify patient Orders. The default section is **Lab** (no need to say **Lab** if your first order is a lab order).

Say **CBC**

to order a complete blood count.

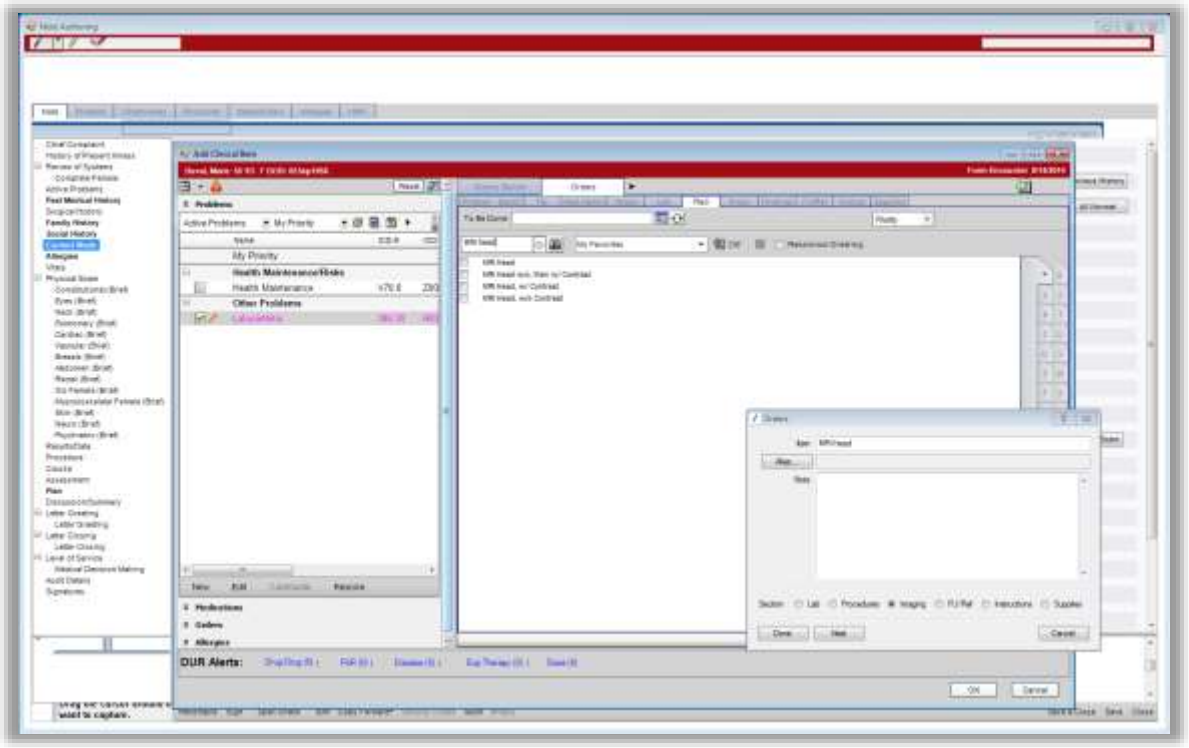


Say **Next** to enter the order and move on to the next order. In your environment, the TouchWorks Order Details window may require additional information from you, such as procedure location, which will be highlighted in yellow. In this case, enter the information and manually dismiss the window.

Say **Imaging**

You will notice the Imaging radio button is now selected.

Say **MRI Head**



Say **Next** to enter and move to the next order, or **Done** if you are finished.

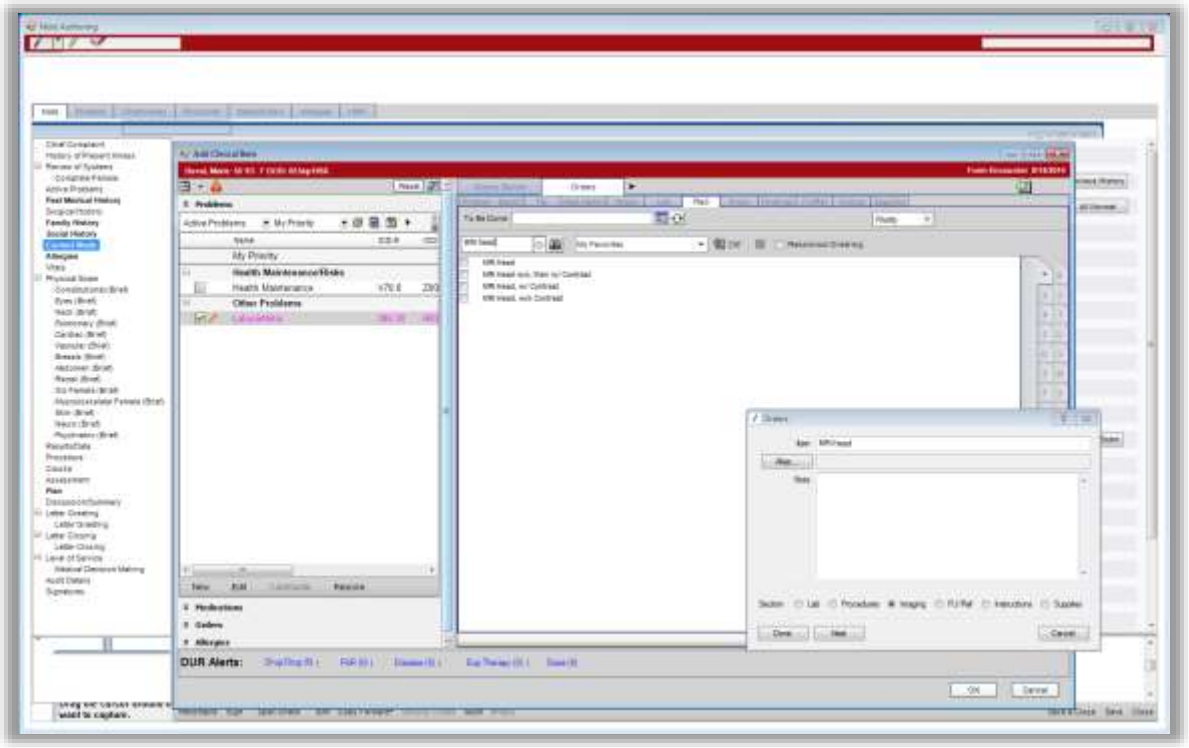
You can also say:
Referral to select FU/Ref
Instructions to select Instructions
Supplies to select Supplies

Using Aliases with Orders

You can create aliases to make it easier to dictate orders.

Say **Orders, Imaging**

In the previous example when we dictated **MRI Head**, we were presented with four choices as shown:



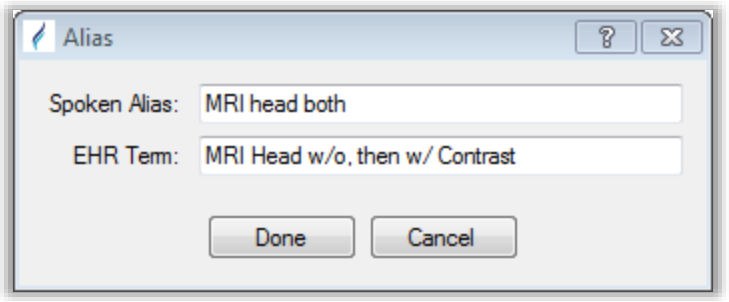
When we said **Next**, NoteSwift selected the first item in the list. It is possible to dictate any of the four choices, but items with various spacing and special characters are not always speech-friendly. To make this process easier, create an alias.

Say **Alias**

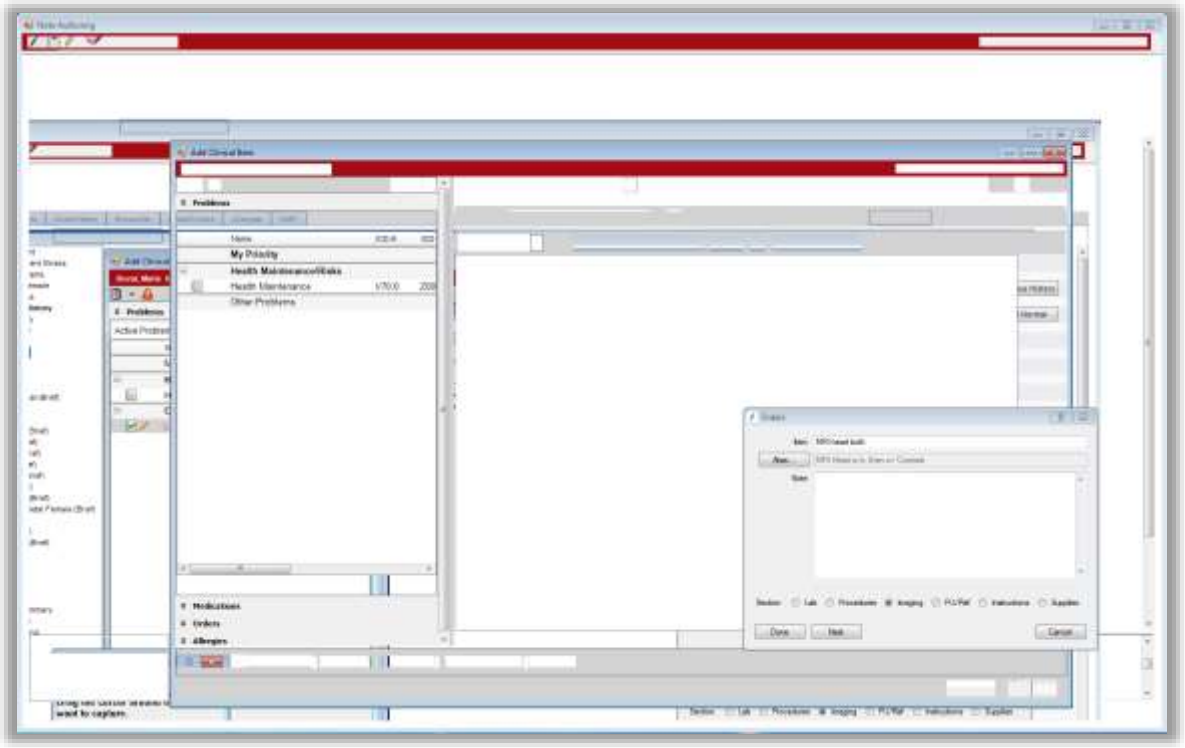
And the NoteSwift Alias form appears. To make an alias for “MRI Head w/o, then w/ Contrast”, first say

MRI head both (or whatever you'd like your spoken version to be).
Then, in the EHR Term field, enter the *complete, accurate* spelling for the item as it appears in Touchworks:

MRI Head w/o, then w/ Contrast



Click or say **Done** to add the alias to your library.
Now, in the Orders form, you can say your spoken term **MRI head both**. You will see NoteSwift substitute the spoken term for the EHR term, find the procedure, and select it in the EHR. The procedure name will be displayed in the gray field next to the Alias button as shown below:

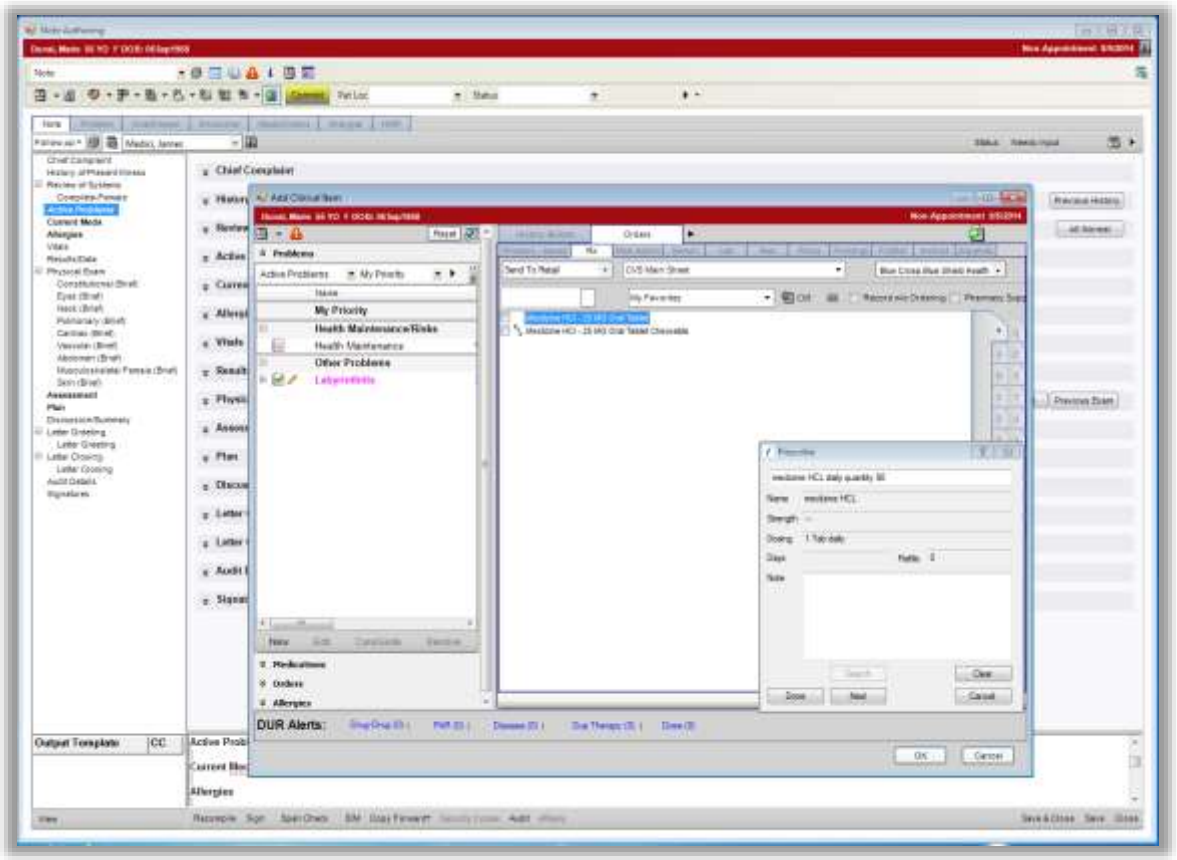


Click or say **Next** to Continue, **Done** if you are finished, or the next section you wish to work in, such as **Prescribe.**

Prescribe

Call up the Prescribe form.

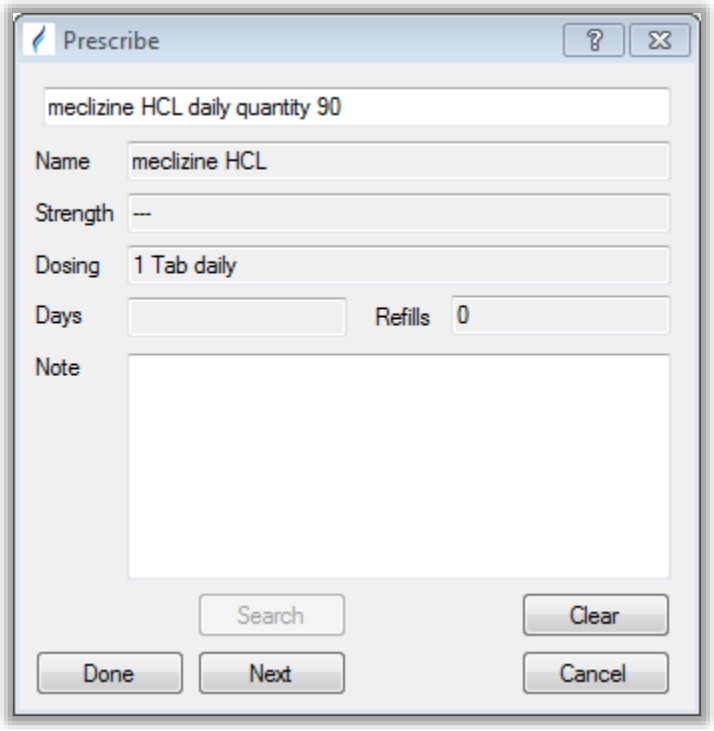
Say **Prescribe**



The NoteSwift Prescribe window appears.

Dictate the medication name, strength, dosing, days and refills. For this example,

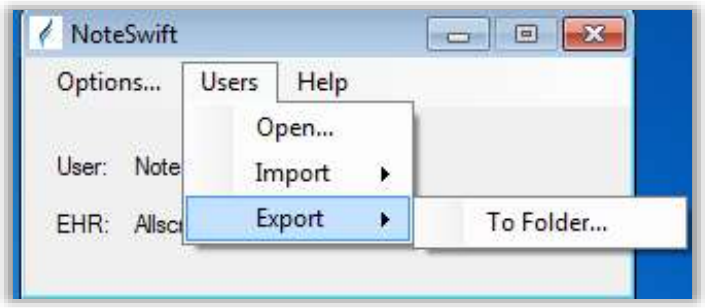
say **Meclizine HCL daily quantity 90**

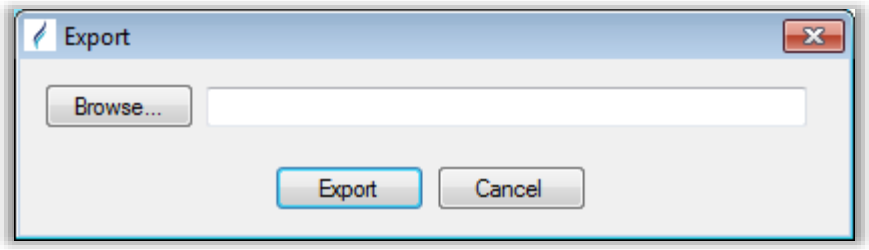


Click or say **Done.** NoteSwift will open the Medication Details window, and insert the prescription with all the appropriate dosage information. Save the Medication Details and close the window to finish the process.

Importing / Exporting Aliases

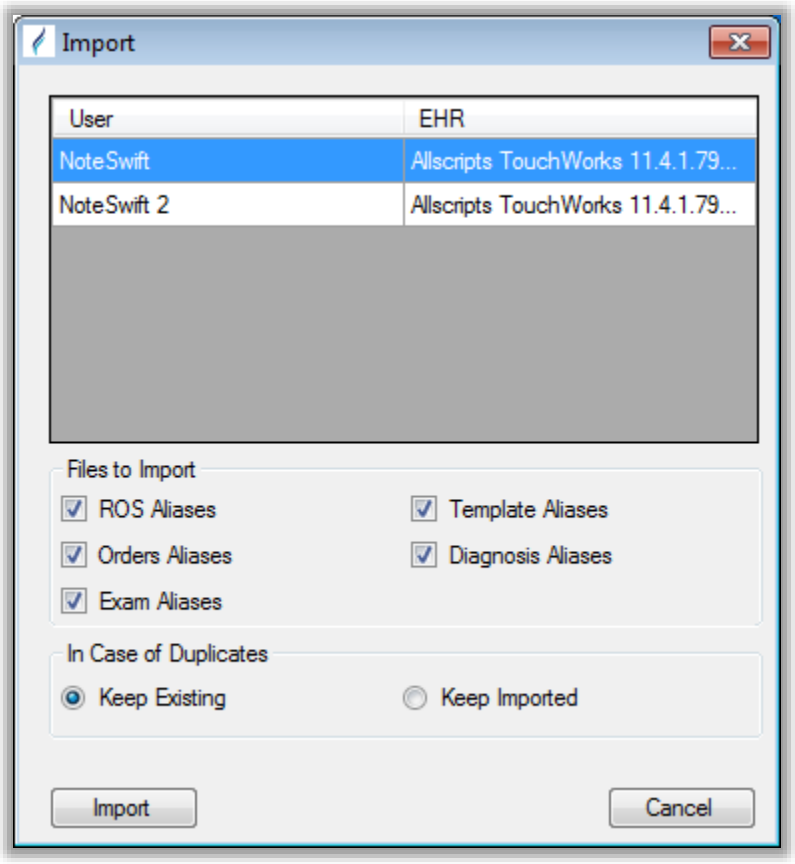
NoteSwift provides the ability to import and export your aliases. You can import either from another user profile you have created in your NoteSwift environment, or a folder. You can export your aliases to a folder. In the NoteSwift application, select Users->Export->To Folder…





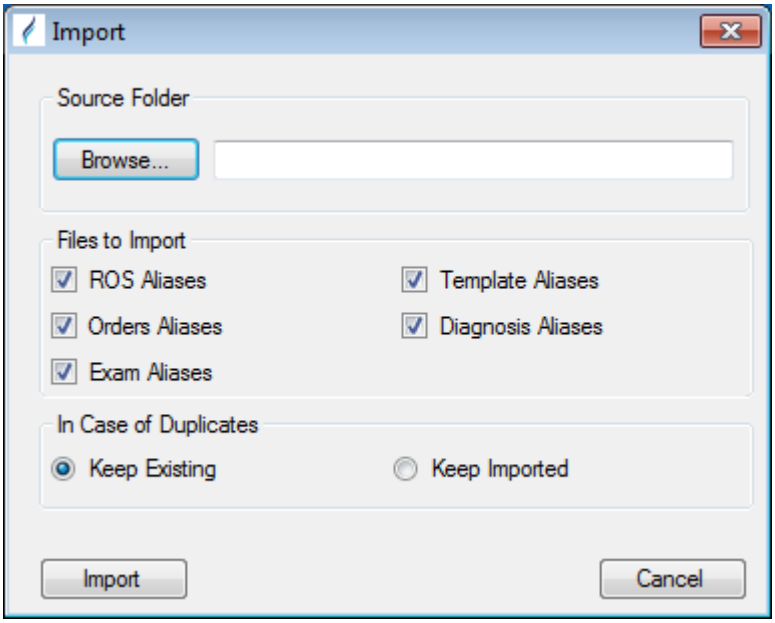
From here, you will browse to the folder where you'd like to place your alias files, optionally creating a new folder for them.

To import from another user, select Users->Import->From User…



Here you can select another user profile and the Aliases you wish to import from it into your currently active profile.

To import from a folder, select Users->Import->From Folder…



Select the alias files you wish to import, browse to the directory where they are located, and click Import.

Appendix A: Command Cheat Sheet

This is the list of available commands to call up the NoteSwift windows, and the commands available within each window. In each form you can dictate **Done, Next** and **Cancel**, as well as the name of any editable field within the NoteSwift window.

NoteSwift Window	What to say to call up the NoteSwift Window	What else you can say
Active Problems	Active Problems	
Allergies	Allergies	
Exam	Exam, Physical Exam	All Normal, Previous Exam
Exam Template	Exam Template, Exam Templates, Physical Exam Templates, PE Template	Alias
Family History	Family History	
History Of Present Illness	HPI, History, History of Present Illness	Previous History
Orders	Orders	Lab, Procedures, Imaging, Referral, Instructions, Supplies
Past Medical History	Past Medical, Past Medical History, PMH	
Prescribe	Prescribe	
Medications	Medications, Meds, Med History, Medication History, Current Medications	
Review of Systems	ROS, Review of Systems	All Normal, Previous Exam
ROS Template	ROS Template, ROS Templates, Review of System Template, Review of Systems Template	Alias
Social History	Social History	
Surgical History	Surgical History	